Wrangling the disconnected sales org

How building a connected sales org can help your business thrive in uncertain times
Introduction

*Disruption.* It’s a word often used in business to describe a shakeup in the way things were—a new technology dawns, altering the playing field; a business fueled by a great idea enters the market, putting legacy companies on notice; or a world event upends the rules of the game.

The past two years have served as a grim reminder that change is often foisted on businesses, not chosen. When the pandemic emerged in early 2020, business leaders prepared for immense challenges, perhaps catastrophic ones. Sales teams suddenly had to shift from being in the office to remote work, and with that change came tech and cultural challenges that companies struggled to navigate.
But as the world opens up—and business leaders take stock—it’s becoming clear that many companies came out of the lockdown period better than they had expected, sometimes even stronger. Yet things will never be the same. The pandemic accelerated customer trends that had been developing steadily over the past two decades, and market uncertainties driven by inflation, recession fears, supply chain problems, and labor shortages mean that companies need tools and plans to attain flexibility in an unstable world.

Companies are now confronting reality: customer patience is threadbare, and loyalty is a thing of the past. Customers have no qualms about switching to a competitor if you aren’t interacting with them the way they want. And those companies that fail to adjust to this new reality—this new way customers expect business to get done—will get left behind.

To understand how businesses are adjusting to this new paradigm, Zendesk surveyed 3,000 CRM decision-makers and influencers around the world. In this in-depth survey, we asked these leaders of small and mid-size companies (50 to 999 employees) about their current CRM systems, their CRM priorities, how effectively their sales teams are adopting tools, the integration of sales and customer support data, and their progress toward digital transformation. What we found is that while these leaders express overall satisfaction with their CRM investments—and how their organizations navigated the pandemic—significant business challenges remain.

Whether it’s piecemeal CRM systems and capabilities, sales teams overwhelmed by the sheer number of available tools, or the intricate challenge of bringing all these systems together, sales leaders have their work cut out for them. The leaders we spoke with made it clear: they need expert guidance when it comes to connecting their sales tools to their wider organizations, and crucially, these managers understand that actionable insights will be the key to creating deeper, lasting relationships with their customers.

This realization has led companies to re-evaluate the efficacy of their sales tools. While business leaders clearly understand just how vital a CRM is to their sales efforts—and that having an agile, well-defined plan in place for challenges such as the pandemic remain paramount—many find themselves asking, “Can I create a connected sales organization with my existing tools, or do I need more?”
The current state of sales tech: putting the puzzle pieces together

Given the pandemic’s far-reaching effects and continuing market uncertainties, it’s not surprising that a supermajority of the CRM leaders we spoke to expressed a desire to transform their sales organizations into truly connected entities. There is widespread agreement that the integration of sales tools and cross-functional collaboration—especially the sharing of customer insights between sales and support—remain critical priorities for retaining customers and staying ahead of competitors.

Yet many of these same leaders express frustration about the pace of change—as one US sales leader put it, “Everything we are doing is very tedious, subjective—we want to glean more integrated information quickly.”

71% say that a sales team must be data-driven and capable of personalizing sales conversations through digital channels.

That struggle to gain rapid insights lies in a host of issues: high levels of staff turnover, confusion about how to integrate and properly use existing tools, and the process of boosting tech skills in the face of resistance from salespeople who previously had been measured primarily by their soft skills.

So while there is broad acknowledgement that integrating support and sales data has a positive impact on the business—when done effectively—many of these sales leaders are struggling to enact change. These same leaders overwhelmingly point toward three main priorities for the next year: integrating sales tools, creating a single view of the customer, and hiring and retaining employees.

72% agree that sales needs to integrate sales tools to avoid losing business and that sales teams must be cross-functional to beat their competition.
72% of sales leaders acknowledge that they need to uplevel their sales teams’ skills, with similar numbers identifying tech-savvy sales reps as out-performing their less tech-inclined peers.

But that’s easier said than done, as one IT director in the UK’s hospitality industry points out. “Post-Covid has shifted to an employees’ market,” they said. “Everyone is looking for the next opportunity in their career. Companies are now seeking stability.”

As a result, many businesses continue to struggle with employee turnover and the dual challenge of attracting top talent and training new hires to make full use of sales tools. Meanwhile, as the markets wobble, the specter of a downturn could lead to layoffs, upending sales organizations.

Yet recognizing these needs doesn’t necessarily translate into action. Adoption of CRM’s most powerful capabilities remains stubbornly low, with a little more than a quarter of teams using predictive analytics or engaging in conversational sales with prospects. Roughly a fifth of these teams are using their CRM’s pipeline management tools, and even fewer are taking advantage of third-party integrations.

And while sales leaders emphasize the need for their organizations to lean into technology and embrace data, startlingly few—again, just about a fifth of respondents—plan to actually take the steps to do so. Why the reluctance?

The evidence points toward two main causes: first, resistance to change has stymied efforts to transform sales organizations into truly connected, data-driven engines of revenue growth. As one CTO put it bluntly, “Every department knows how to build a solution in Excel; it may not be efficient, but they can do what they need to do to solve their problem; teams can think in those terms [of what’s possible in Excel]. Their attitude is, ‘Give me a solution, let me extract that data so I can put it in Excel and do what I want to do.’”

Changing how institutions work is not a new problem, and in this case it’s compounded by the second factor: a lack of clarity at the leadership level. Not only are these leaders struggling to change how their teams work, they’re also unsure of the right path to do so, leading to a state of paralysis—or, to be generous, transformation is happening, just at a glacial pace.
So while sales leaders grapple with these issues, a growing contingent—about 25 percent—want to add conversational sales capabilities to their teams, seeing them as opportunities for improvement and innovation.

But here again we see a disconnect. While leaders see conversational sales as being an essential tool to gain an advantage over competitors, only a fifth have plans in the next year to take action.

25 percent of sales leaders want to add conversational sales capabilities to their teams.

“When looking at our organization, the CRM is becoming a central repository of info of all the interactions we have as an organization: interactions, meetings, documents, reporting, onboarding materials for clients and vendors, and regulatory compliance.

It is a single pane of glass that can incorporate all of this info into one place without having to visit underlying systems if you didn’t need to.

That’s the holy grail, but not the current state. We’re not there yet, but we’re confident that we will get there.”

—CTO of a mid-size company, financial services
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Standard Beverage’s tech challenges

When Standard Beverage, the leading distributor of alcoholic beverages in the state of Kansas, suddenly faced a huge market opportunity, it scrambled to find ways to rise to the occasion. Its sales team, which was accustomed to writing client information on scraps of paper or simply relying on memory, realized that it couldn’t operate as if nothing had changed.

The team opted for an easy-to-use CRM, one the reps could adopt quickly. That proved to be the key for pushing the team to modernize its sales methods, which led to a 300 percent increase in accounts while the number of new hires jumped by 66 percent.
What’s keeping companies from creating connected sales orgs?

As we’ve seen, business leaders continue to wrestle with the challenge of creating truly connected sales organizations, and confusion about how to enact change remains widespread. Our research indicates that businesses face three major obstacles that have so far stymied their efforts to transform their sales organizations. Let’s take a closer look.

**Piecemeal approach to buying sales software has resulted in fragmented tech stacks.**

Here’s where we see a disconnect between what IT leaders are saying about their sales teams’ tech stacks and what senior sales executives see on the ground. While IT leaders express confidence that they have secured the necessary tools to create connected sales organizations, sales leaders were less likely to agree that their teams have actionable insights in real time, possess the right tools to succeed, and can communicate with prospects across multiple channels.

This suggests that IT executives may be operating under different assumptions about how these CRM tools are being used, ones not borne out by the experiences of sales leaders.

One factor that could be contributing to adoption issues:

**Most sales teams report using an average of 4.7 tools, and a significant plurality—46 percent—indicate that they plan to add more tools over the next year.**
With only 10 percent of teams planning to eliminate tools from their tech stack, the trend speaks to missed opportunities. Instead of streamlining their tech stack, a move that would encourage adoption and help bring about a unified view of the customer journey, many businesses are holding firm or adding complexity to the mix.

All this stands in contrast to what sales representatives have been telling their leaders: nearly a third report feeling overwhelmed all or almost all of the time.

Simply adding more tools won’t alleviate this stress or make teams function more efficiently, and as one IT director in the food industry put it, “We work hard to keep things organized, efficient, integrated—see what tools they need. But you don’t want to overwhelm different departments. Sometimes it is good to keep things separated and streamlined. I have to keep everyone happy and functioning.”

Sales teams are overwhelmed by the sheer volume of sales tools—and it’s not going to get any easier.

So with sales teams already using on average nearly five tools to close deals—and with the prospect of even more looming on the horizon—how can business leaders set their teams up for success?

Nearly 80 percent of respondents reported that their organizations plan to increase their budgets for CRM and other sales tools, which means even more complexity in the face of an already overwhelmed salesforce.

For example, just a little more than a quarter of sales teams have in-tool coaching capabilities to guide reps to better outcomes, and a similar number employ AI and automation of tasks to increase efficiency. Yet there seems to be little appetite for leaning into these highly effective strategies, with only 28 percent identifying call and meeting recording capabilities as priorities.
So for sales and IT leaders, a pressing question remains: how exactly will adding more sales tools help teams face the market challenges of the future?

Leaders struggle with knowing where to start bringing systems together.

As it stands, the leaders we spoke to made it clear that they have yet to devise, much less implement, strategies for using and integrating these additional tools. Given the aforementioned low adoption rates of existing tools, it seems clear that sales leaders are experiencing cognitive dissonance: while nearly 90 percent believe their teams are prepared for the future, and more than two-thirds think that their teams have the tools necessary to succeed, the data tells another story.

For example, two-thirds of teams that lack integrated solutions recognize the negative impact on sales success.

Yet some leaders clearly understand how an integrated CRM can help, such as this sales leader in the US retail market: “The key benefit of a CRM tool is company-wide visibility, company-wide transparency. The company can see what is going on—where the business is, where the problems are, and where the opportunities are. Everyone wants to sell more products, and if everyone can see what is going on, everyone can work together to grease those wheels.”

The question for many leaders seems to be, “How can we get there?” The missing element for many, it appears, is clear guidance about how to implement change.
Strategies for creating a connected sales org

But there’s good news for these sales leaders: there are clear ways to create a connected organization that don’t require a multi-year investment.

Bring sales and customer support closer together.

This goes far beyond simply breaking down silos between sales and support; it means actively integrating sales and support data, which only 35 percent of companies are doing right now. While the leaders we spoke to understand the primary benefits of unifying sales and support—better marketing efficiency, deeper customer relationships, and enhanced customer success—they don’t see a clear path forward.

Fortunately, there are trailblazers who have shown that bringing sales and support closer is eminently achievable. Take Conrad Electronic, for example.

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The global retailer, which has been supplying high-quality components, tools, and other tech solutions for nearly a century, chose a unified CRM and support solution that gives service and sales reps access to detailed customer information.

That 360-degree view of the customer not only helps Conrad Electronic provide robust service when things go wrong, it also sheds light on pain points that make it harder for the business to sell its products.

“We want to make things as easy as possible for our customers. One reason a customer gets in touch with the Customer Care team might be because something isn’t working. And then we have two tasks: one is to provide him or her with the best possible help as quickly as we can,” says Sven Wachtel, senior director of customer care for Conrad Electronic.

“The other is, as a business, to take immediate lessons from this query: where is the inconvenience, what is the sticking point in the process that is holding the customer up? That is what we have to eliminate so that things go smoothly in the future.”
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For Wavy, gaining customer loyalty comes down to not only the quality of its product, but also how effective Wavy’s team could be at delivering impeccable customer experiences, not only in support but also throughout the sales process. To that end, Wavy made the decision to consolidate their sales and support operations and data onto one platform, in the process improving productivity, processes, and visibility across these key customer-facing teams.

After going live on their newly unified CRM, agents and sales reps immediately saw all customer communication in one place. They were relieved to no longer have to manage several different tools or trace back complex customer journeys. On top of that, having both its sales and support tools integrated on an open platform means that Wavy was able to connect its marketing automation as well.

With all three in sync, Wavy has a complete view of its customers, from acquisition onwards. The result: a 400 percent improvement in first reply time, and a 25 percent conversion rate on the sales side.

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―Sales Ops leader,
Business Services, UK
The soft skills necessary to build customer relationships are nothing new to sales teams, of course—closing deals requires a personal touch. But that’s not enough to stay competitive. Tech-enabled, data-driven approaches to creating and nurturing deeper relationships with customers has become essential.

That means going beyond the old-school concept of viewing customers as a sale, a lead, an opportunity, or a ticket. It’s about curating conversations that feel like the typical exchanges they have in their personal lives.

Think of it like one continual conversation between a brand and its customers, in which support representatives and salespeople alike have the same context.

The beauty of this approach is that it leads to deeper relationships and better business outcomes at a lower level of effort.

Unless there’s a shift, one that leads to sales teams receiving the technology necessary to embrace the age of conversation, it stands to reason that companies will largely fall short of achieving true conversational sales.

One glaring reason for this is that while a whopping 85 percent of the leaders we spoke to have some familiarity with the term conversational sales, only 38 percent felt that they have a deep understanding of what it entails.

Of respondents said that conversational sales will be important to their companies over the next year.

Only 27 percent have conversational sales capabilities in their CRM—and just 20 percent plan to add these capabilities in the next 12 months.

Arm your teams with the right information for better, deeper conversations.

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That points to continued adoption issues as leaders struggle to understand the concepts behind conversational sales, which can be broken down into three main concepts.

**Integrated into everyday life.**

That means whether you’re a sales rep or a support agent, you can have seamless conversations across channels (messaging, email, phone, and so on) with your customers, no matter which stage of the journey they’re in. It’s just like the conversations we all have with our friends that might start as an email, before moving to the phone, and ending with a series of texts. With the right technology—and buy-in from the sales team—this experience will feel natural and easy for your customers.

**Intelligently personalized.**

By leveraging data and automation, companies can provide the kind of personalized experiences that make customers feel seen and valued. Much like a small-town cafe where the staff knows all the regulars, businesses must use technology to provide an intimate experience.

**Leads to a solution.**

Of course the point of this isn’t to create warm, personalized conversations with customers for the sake of it. Conversations must end with a solution that resolves a customer’s issue, whether it’s on the support side or making that first—or 40th—purchase. That resolution, which must happen quickly and efficiently, can only come from integrated technology that gives your team everything they need.

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Polaris is a powersports titan that specializes in boats, off-road vehicles, commercial vehicles, and motorcycles.

The company has invested in a unified CRM, bringing together sales and support, to create deeper, richer conversations with their customers, many of whom are exploring the company’s new subscription model.

As Gary Rentz, senior director at Polaris, put it, "A unified customer view means richer customer conversations with deeper communications. Today we are able to see the full life cycle of a customer and understand how consumers are interacting with us.”
CONCLUSION

Where businesses go from here

Make no mistake: the issues sales teams face in the current business environment will only get more challenging. While we found some promising trends in our research—widespread acknowledgment of the importance of integrating sales tools, using a connected tech stack to create a single view of the customer, and embracing the age of conversations—leaders are failing to lay the groundwork for success.

The confidence many feel about the state of their sales teams might be better than rank pessimism, but the market doesn’t care about how business leaders feel about their organizations. There might be a bright future ahead for sales organizations, but until companies jettison their cautious, modest steps toward digital transformation, the dream of the truly connected sales team will remain just out of reach. And the consequences will be failing to meet customer expectations, lost revenue, and the greatest danger: being eclipsed by the competition.

To learn more about how Zendesk can help you create a connected sales org, visit our [website](https://www.zendesk.com).