VESPER®

Commercial
Excellence.

Emerging Trends and their Impact on the Commercial Landscape

Navigate the future with key insights
in current trends and their impact
on the commercial function

October 2024

An Introduction

In this first edition of our trends research, Vesper Commercial Excellence surveyed commercial leaders and executives to discover

Which key trends are affecting the commercial organization

How these trends impact the different sales force drivers

How organizations currently engage with these trends in the commercial function

What challenges they face in addressing these trends

The data in this report was collected through an anonymous survey conducted in August 2024. The survey generated 130 responses from a range of sales and marketing leaders across 16 different countries and 11 industries.

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Foreword

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Vesper Commercial Excellence

The dynamic and rapidly evolving nature of the commercial landscape presents both opportunities and challenges for leaders across industries. To better understand these dynamics, we conducted a comprehensive survey targeting commercial leaders and executives within our network.

Our research revealed a wealth of information about how commercial leaders are navigating the complexities of today's markets. From the impact of digital transformation to the importance of employee well-being in the commercial domain, this report highlights the key sales force drivers that are impacted and require engagement to ensure future business success. Furthermore, it underscores the proactive measures leaders are taking to adapt their sales & marketing functions to these trends and the challenges they face in doing so.

This report offers a clear and concise overview of the survey results. Each section explains specific commercial aspects of key strategic trends, providing both quantitative and qualitative insights.

We thank the commercial leaders and executives who took part in this survey. Their insights and experiences have been invaluable in shaping this report. We hope that the findings and recommendations presented will serve as a useful resource for all stakeholders seeking to successfully navigate the ever-changing commercial landscape.

Thank you for your interest in this report. We look forward to engaging with you further on this topic.

Best regards,
Gerben Willemsen

Executive Summary

The findings highlight five key trends impacting organizations. These strategic trends significantly affect various sales force drivers, which are essential for maintaining competitive advantage and ongoing return on sales.

Notably, the effects of these trends vary across different industry segments.

While many organizations are already taking action to address these trends, a significant number of companies still need to start executing on these and are at risk of suffering significant impact on business results.

Key Trends

The following 5 trends are identified as most important:
- ❖ Employee well-being
- ❖ Customer experience management (CXM)
- ❖ Data drivenness and big data
- ❖ Artificial Intelligence (AI)
- ❖ Tight labor-market

Importance of Sales Force Drivers

Most important sales force drivers impacted:
- ❖ Culture
- ❖ Training
- ❖ Leadership
- ❖ Recruiting
- ❖ Sales performance management
- ❖ Compensation
- ❖ Customer experience
- ❖ Value proposition
- ❖ Strategic positioning
- ❖ Meaningful work

Challenges

Key commercial challenges arising from the identified trends:
- ❖ Lack of leadership commitment, understanding and strategic guidance
- ❖ Knowledge gaps in emerging technological areas like big data and AI
- ❖ Employee and customer retention

Urgency and Engagement

The majority of organizations still need to act urgently (within 1 year) on the following trends:
- ❖ Customer experience management (CXM)
- ❖ Data drivenness and big data

Key Trends
Impact

The survey uncovered the following strategic trends as having the most significant impact on the commercial function in terms of revenue

| Employee Well-Being | Customer Experience Management | Data Drivenness and Big Data | Artificial Intelligence | Tight Labor Market |

By recognizing the impact of these trends, businesses can better position themselves to capitalize on opportunities and address challenges effectively. Strategic planning and continuous adaptation are crucial in responding to these evolving trends.

Impact trends on revenue (positive or negative)

Employee Well-Being
- 28,1%
- 36,8%
- 18,4%
- 9,7%
- 7,0%

Customer Experience Management (CXM)
- 19,3%
- 37,7%
- 20,2%
- 17,5%
- 5,3%

Data Drivenness and Big Data
- 26,3%
- 28,1%
- 20,2%
- 17,5%
- 7,9%

Artificial Intelligence (AI)
- 24,6%
- 26,3%
- 14,9%
- 35,4%
- 8,8%

Tight Labor-Market
- 23,7%
- 30,7%
- 14,9%
- 14,9%
- 15,8%

Legend:
- Extreme Impact >10%
- High Impact 5%-10%
- Moderate Impact 3%-5%
- Little Impact 1%-3%
- No Impact <1%
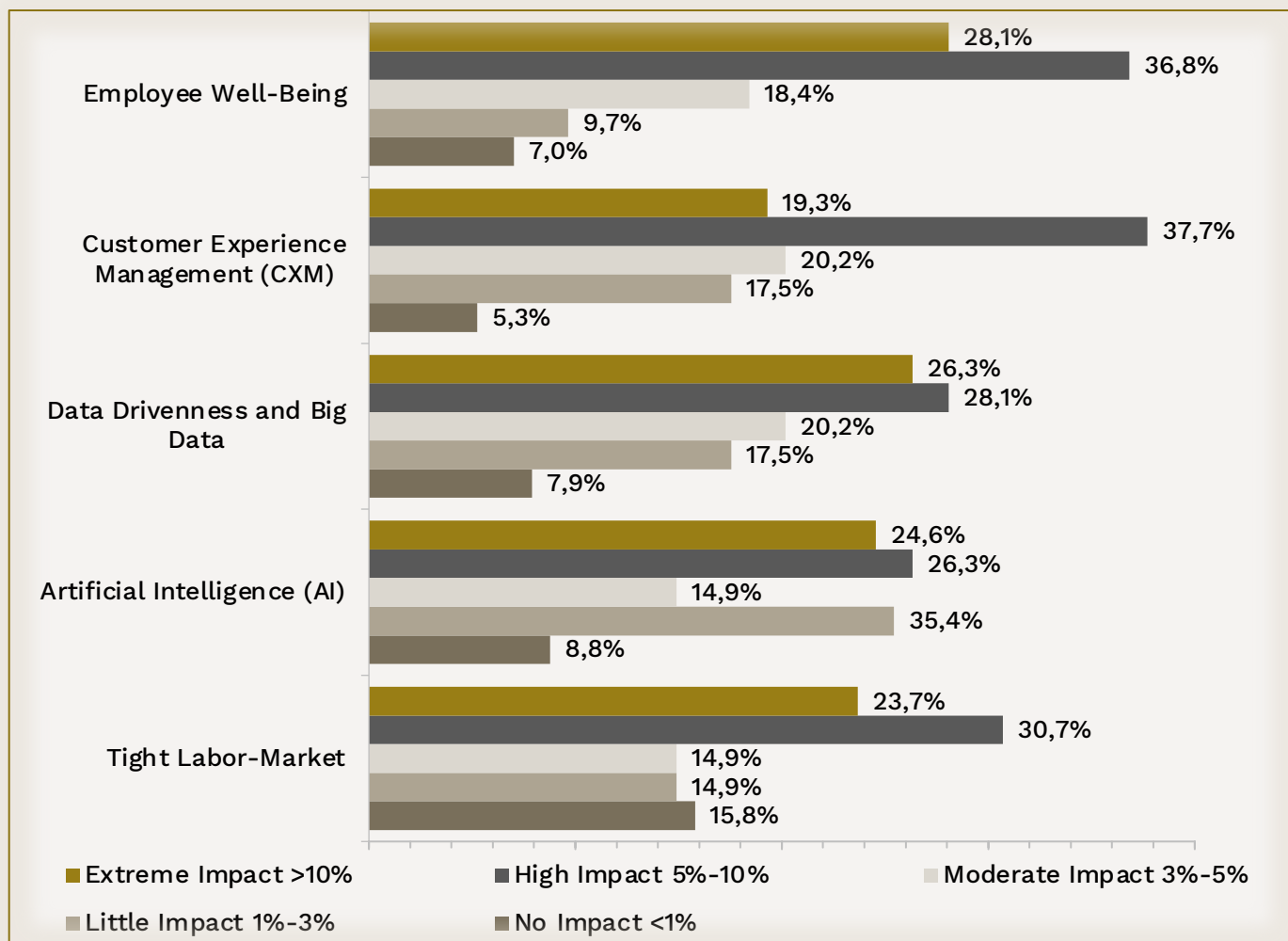
Key Trends
Specifications

Strategic trends specifications and their impact on the commercial function

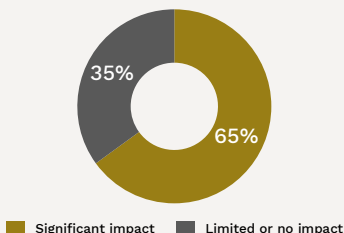| Employee Well-Being		
	35% 65%	Employee well-being focuses on the mental, physical, and emotional health of an organization's workforce. Organizations have increasingly recognized the correlation between a healthy, happy (commercial) workforce and higher productivity, lower absenteeism, and stronger employee retention. The trend is driven by factors such as rising attention to mental health, post-pandemic recovery efforts, and evolving work expectations like flexible hours and hybrid work models.
	■ Significant impact ■ Limited or no impact	
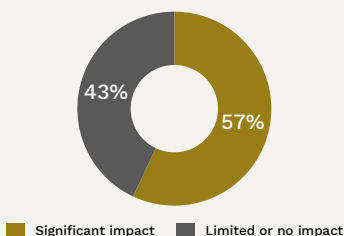
| Customer Experience Management		
	43% 57%	Customer experience management (CXM) is about strategically managing interactions with customers across various touchpoints to maximize satisfaction and loyalty. With increasing digitalization, consumers expect personalized and seamless experiences, making CXM a critical focus area for businesses aiming to differentiate themselves in competitive markets.
	■ Significant impact ■ Limited or no impact	
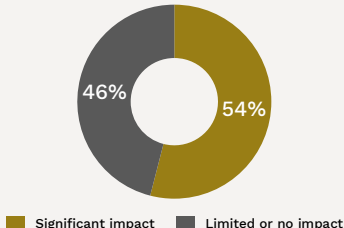
Data Drivenness and Big Data		
	46% 54%	Data-drivenness and the use of big data involve leveraging vast amounts of information to drive informed decision-making, streamline operations, and create personalized customer experiences. As data becomes increasingly accessible, investing in tools and systems to harness this information will enable organizations to strengthen their competitive advantage.
	■ Significant impact ■ Limited or no impact	
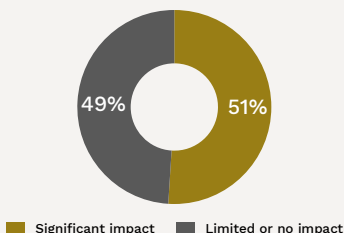
Artificial Intelligence		
	49% 51%	Artificial Intelligence (AI) involves the development of systems that can perform tasks normally requiring human intelligence, such as visual perception, speech recognition, and decision-making. AI is transforming the commercial function by automating routine tasks, enhancing predictive capabilities, and unlocking new business models.
	■ Significant impact ■ Limited or no impact	
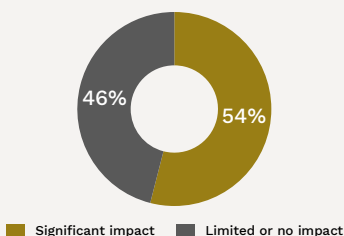
Tight Labor-Market		
	46% 54%	A tight labor market refers to a market situation with more job openings than available workers, driving competition for talent. This typically leads to wage increases, recruitment difficulties, and retention challenges, especially in sectors where skilled labor is in short supply. Navigating this requires commercial organizations to be flexible and innovative in managing their sales and marketing talent.
	■ Significant impact ■ Limited or no impact	

Key Trends
Demographics

In this section, we explore the impact of demographics on the key trends, focusing on how organizations of varying sizes and industries are responding to major market shifts. By analyzing the impact of these trends across different organizational profiles, we gain valuable insights into the diverse ways companies are adapting and prioritizing their efforts to remain successful.

	Employee Well-Being	Customer Experience Management	Data Drivenness and Big Data	Artificial Intelligence	Tight Labor-Market
Age Groups	The trend of employee well-being is growing in importance. Interestingly, respondents **over the age of 60** see it as having the most significant impact on their organization's revenue. This likely reflects their experience in valuing well-being's effect on long-term productivity and retention. Older professionals may prioritize it more than younger ones, who might focus on immediate operational challenges, while senior leaders recognize its long-term organizational benefits.	Customer experience management (CXM) is emerging as a critical driver of success across various demographics and organizational profiles. Notably, respondents in the **26-45 age group** have highlighted that CXM has the most significant percentual impact on their organization's revenue. This insight reflects the growing importance of CXM among mid-career professionals who are often responsible for steering customer engagement strategies and recognizing its influence on business growth.	Across **all age groups**, respondents consider the trend of data drivenness and big data important for their organization, with no significant deviations in perceived impact between different age groups.	Across **all age groups**, the trend of artificial Intelligence is seen as highly important, with no significant differences in perception between different age segments.	**All age groups** consistently view the tight labor-market as a critical trend, and there are no notable differences in how different age segments perceive its impact.
Organization Sizes	**Organizations with 0-10 employees** reported that the trend of employee well-being has the greatest impact on their operations. The tight-knit nature of small teams likely makes employee well-being more visible and immediately impactful on business outcomes.	**Organizations with 1001-10,000 employees** were the most vocal about the impact of CXM. These larger organizations typically have more complex large customer bases and are investing heavily in customer experience to drive competitiveness.	When analysing the impact of data drivenness and big data, a clear distinction emerges across organizational sizes. Notably, **organizations with 0-10 employees** indicate that they do not see this trend as having a significant impact on their operations. Smaller businesses often lack the resources, funding and scale required to fully capitalize on data-driven initiatives, which may explain their lower engagement with this trend.	AI is significantly impacting **organizations with 1001-10,000 employees**. These large-sized companies are reporting the most significant percentage impact from AI, likely due to their ability to invest in advanced technologies and leverage AI to enhance operational effectiveness, customer engagement, and decision-making. By automating processes, improving data analytics, and personalizing customer interactions, AI is driving efficiency, innovation, and competitive advantage for these businesses.	The tight labor-market is exerting considerable pressure across organizations, particularly those with larger workforces. **Organizations with 1001-10,000 employees** report the greatest impact from labor market challenges. Their need for specialized talent and to fill critical roles puts more pressure on them compared to smaller businesses. Larger companies face higher costs and complexity, making workforce shortages more difficult to manage, prompting them to adopt new strategies.
Industry Sectors	**All industry sectors** recognize the importance of employee well-being. Whether in manufacturing, healthcare, technology, or finance, companies are facing increased pressure to foster environments that support mental, emotional, and physical well-being.	Particularly noteworthy is that **all industry sectors** consistently identified CXM as having a significant impact. This suggests that regardless of the sector, delivering superior customer experiences has become central to long-term business success. Across industries, companies are recognizing that managing customer expectations and satisfaction is key to driving customer loyalty and value.	**Manufacturing and industrial goods** sectors expressed that they do not view data drivenness and big data as particularly impactful for their organizations. This may be caused by the fact that these sectors traditionally rely on more physical processes and may not yet see clear, direct benefits of data integration in their daily operations. However, as data-driven innovations continue to evolve, even these sectors may need to reconsider their stance to remain competitive.	Across **all industry sectors**, the trend of artificial intelligence is viewed as highly important, with no significant deviations in perception between different industries.	The tight labor-market is recognized as a key issue across **all industry sectors**. Businesses are grappling with the difficulties of securing the talent they need to maintain productivity and drive growth. The widespread acknowledgment of this trend highlights the importance of workforce planning, competitive compensation, and employee retention initiatives across the board.

Sales Force Drivers
Introduction

The success of commercial leaders in navigating current market trends heavily relies on addressing the consequences of these trends for the respective sales force drivers. These drivers are crucial for driving sales performance and commercial excellence. To clarify and specify how proactive commercial leaders are responding to current market trends, an overview of the impact of these trends on the sales force drivers, organized by cluster is presented. Following this, a detailed explanation is provided of the impact of each specific trend on the respective drivers, along with the challenges organizations face in addressing them.

Categories of sales force drivers and their impact on commercial performance

Sales force drivers

Definers
- Strategic positioning
- Go to market
- Commercial strategy
- Value proposition

Shapers
- Recruiting
- Training
- Coaching
- Culture

Enlighteners
- Customer experience
- Sales process framework
- Sales target management
- Customer lifecycle

Exciters
- Leadership
- Compensation
- Motivation programs
- Meaningful work

Controllers
- Sales performance management
- Meeting structure
- Vertical and horizontal communication

Impact

- Roles
- Territory

- Skills
- Capabilities

- Customer insight
- Sales process

- Inspiration
- Motivation

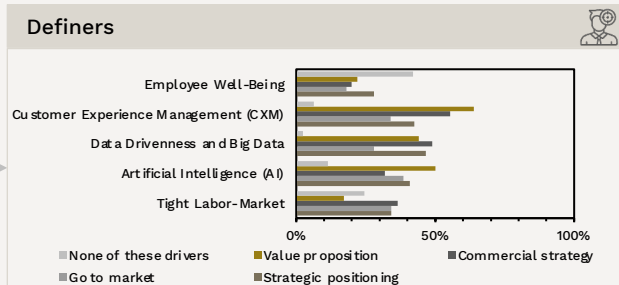- Expectations
- Success measures

Salesperson
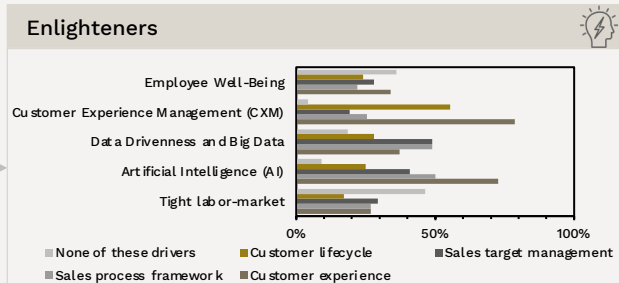
Activity
Behavior

Sales Force Drivers
Overview

Sales Force Drivers and Impact per Strategic Trend

Definers

- None of these drivers
- Value proposition
- Commercial strategy
- Go to market
- Strategic positioning

DEFINERS are responsible for making the structural decisions that shape the commercial organization and the role of the sales force. This includes everything from defining job roles to determining territory alignment and optimizing the go-to-market strategy. By focusing on these foundational decisions, organizations ensure the commercial team is strategically positioned to maximize coverage, effectiveness, and market impact.

Shapers

- None of these drivers
- Culture
- Coaching
- Training
- Recruiting
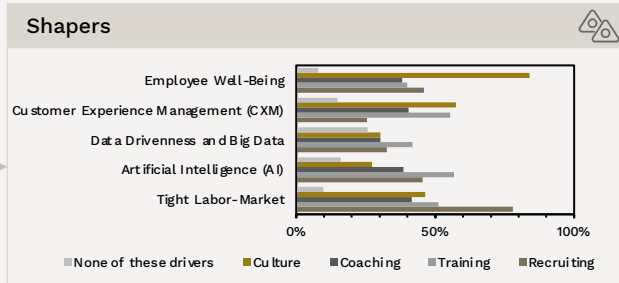
SHAPERS focus on building the team by developing the right talent, culture, and skill set within the commercial organization. The decisions revolve around creating an environment that fosters high-performing sales professionals through strategic hiring, training, coaching, and leadership development. Shapers influence the organization's long-term capabilities and values, ensuring the team is equipped to meet future challenges.

Enlighteners

- None of these drivers
- Customer lifecycle
- Sales target management
- Sales process framework
- Customer experience

ENLIGHTENERS provide the commercial team with the insights and tools needed to navigate the marketplace effectively. Programs are designed to help salespeople prioritize opportunities, understand customer needs, and optimize their time. By driving initiatives such as customer research, targeting, sales process design, and CRM implementation, enlighteners ensure that the sales team is well-prepared to solve customer problems and deliver value.

Exciters

- None of these drivers
- Meaningful work
- Motivation programs
- Compensation
- Leadership
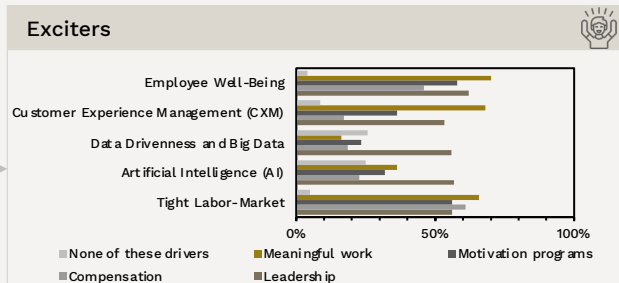
EXCITERS are all about driving motivation and enthusiasm within the commercial organization. They create a culture of inspiration by leveraging motivational tools such as incentive compensation, recognition programs, and meaningful work. By fostering a positive and energetic environment, exciters ensure that sales teams stay driven, engaged, and focused on achieving ambitious targets.

Controllers

- None of these drivers
- Vertical and horizontal communication
- Meeting structure
- Sales performance management
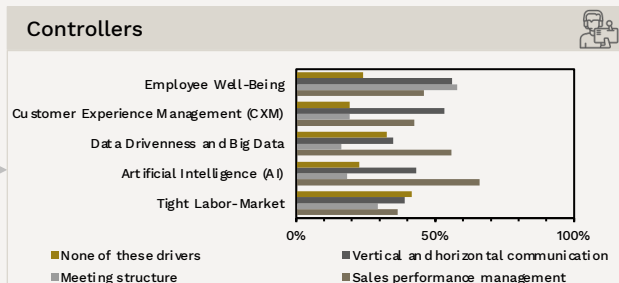
CONTROLLERS are the architects of performance management. They set clear expectations, define what success looks like, and put systems in place to track and measure sales performance. By aligning these efforts with other drivers, controllers help ensure that the commercial team stays accountable, meets objectives, and consistently delivers results.

Sales Force Drivers
Clarification

Employee Well-Being

Definers

Driver	%
None of these drivers	
Value proposition	
Commercial strategy	
Go to market	
Strategic positioning	

(Bar chart, axis 0% – 100%)

Shapers

Driver	%
None of these drivers	
Culture	
Coaching	
Training	
Recruiting	

(Bar chart, axis 0% – 100%)

Enlighteners

Driver	%
None of these drivers	
Customer lifecycle	
Sales target management	
Sales process framework	
Customer experience	

(Bar chart, axis 0% – 100%)

Exciters

Driver	%
None of these drivers	
Meaningful work	
Motivation programs	
Compensation	
Leadership	

(Bar chart, axis 0% – 100%)

Controllers

Driver	%
None of these drivers	
Vertical and horizontal communication	
Meeting structure	
Sales performance management	

(Bar chart, axis 0% – 100%)

Impact of employee well-being on key sales force drivers

Employee well-being has become a critical factor in shaping sales organizations, with respondents highlighting its significant impact on several key sales force drivers. The graphs show how this trend is influencing the structure and culture of sales and marketing teams.

A focus on well-being deeply influences **culture**, creating the need for an environment of support, positivity, and engagement that helps drive retention. In a competitive talent market, **recruiting** is also a key focus area, as candidates increasingly seek workplaces that prioritize health, well-being, and work-life balance.

Training programs are evolving to include topics like stress management and maintaining a healthy work-life balance, reflecting companies' growing investment in the holistic well-being of their teams. At the same time, **leadership** plays a crucial role in promoting these well-being initiatives, fostering a culture of care and empathy within the sales force.

Compensation packages are no longer just about salary — **compensation** now includes well-being-related benefits like gym memberships, mental health support, and flexible work arrangements. **Motivation programs** are shifting from purely financial rewards to initiatives that promote personal well-being, such as wellness days and personal development opportunities.

The focus on **meaningful work** aligns with this trend, as employees increasingly seek fulfilment in their roles, and companies ensure that well-being is valued alongside business contributions. This has led to a more holistic approach to **sales performance management**, where well-being is considered as part of sustainable team performance.

The structure of meetings is also evolving, with **meeting structure** designs shifting to more supportive, less stressful formats that encourage collaboration and well-being. Finally, **vertical and horizontal communication** incorporates well-being check-ins, ensuring that emotional and mental support are integral to team dynamics.

It's important to note that, according to respondents, the sales force drivers in the **definers** and **enlighteners** clusters are not significantly impacted by this trend. This suggests that while well-being is crucial for team dynamics and motivation, the commercial operational structures and informational processes remain relatively unchanged.

Trend → **Impact** Sales Force Drivers → **Clarification**

Challenges
Employee Well-Being

Alongside the key trends and their impact on the sales force drivers, challenges are explored that sales and marketing executives face in adapting to and addressing changes when acting upon these trends.

Our analysis identified the following challenges as most important in addressing and adapting to the trend employee well-being:

❖ Leadership Commitment and Capabilities
❖ Measuring and Demonstrating Impact
❖ Work Environment and Hybrid Challenges
❖ Employee Retention and Engagement
❖ Organizational Culture and Communication
❖ Underestimation and Potential

Leadership Commitment and Capabilities

One of the primary challenges in promoting employee well-being is ensuring **leadership commitment**. In many cases, there's a **lack of commitment** from top leadership, which limits the effectiveness of well-being initiatives. Leaders must not only support these efforts but also possess the **capabilities** to drive well-being within their teams. There's also a growing need for **ethical leadership and training** to be implemented from the top down to foster a culture that values well-being.

Measuring and Demonstrating Impact

A persistent challenge is **measuring the effects** of well-being programs. Quantifying the impact on employee satisfaction, productivity, and retention is often difficult. Companies must also balance **maximizing productivity** with maintaining employee loyalty and supporting personal development, without overwhelming their workforce.

Work Environment and Hybrid Challenges

With the shift to hybrid work models, managing **employee well-being** has become more complex. Ensuring employees remain supported and cohesive in a **hybrid environment** is challenging. Additionally, the **fast-changing commercial landscape** creates constant pressure on employees, adding to their stress and potentially impacting their well-being.

Employee Retention and Engagement

A key concern for organizations is **keeping employees happy and engaged**. With retention becoming more difficult, companies must focus on both **financial incentives**, like salary and bonuses, and well-being initiatives to remain the employer of choice. It's also important to **tailor well-being programs** to the individual needs of employees, rather than taking a one-size-fits-all approach.

Organizational Culture and Communication

Creating a supportive and open **communication culture** is vital for employee well-being. Ensuring that leadership maintains **transparent communication** with employees fosters trust and engagement. After a **reorganization**, many employees struggle with their sense of identity and purpose, which can negatively affect their well-being if not addressed properly.
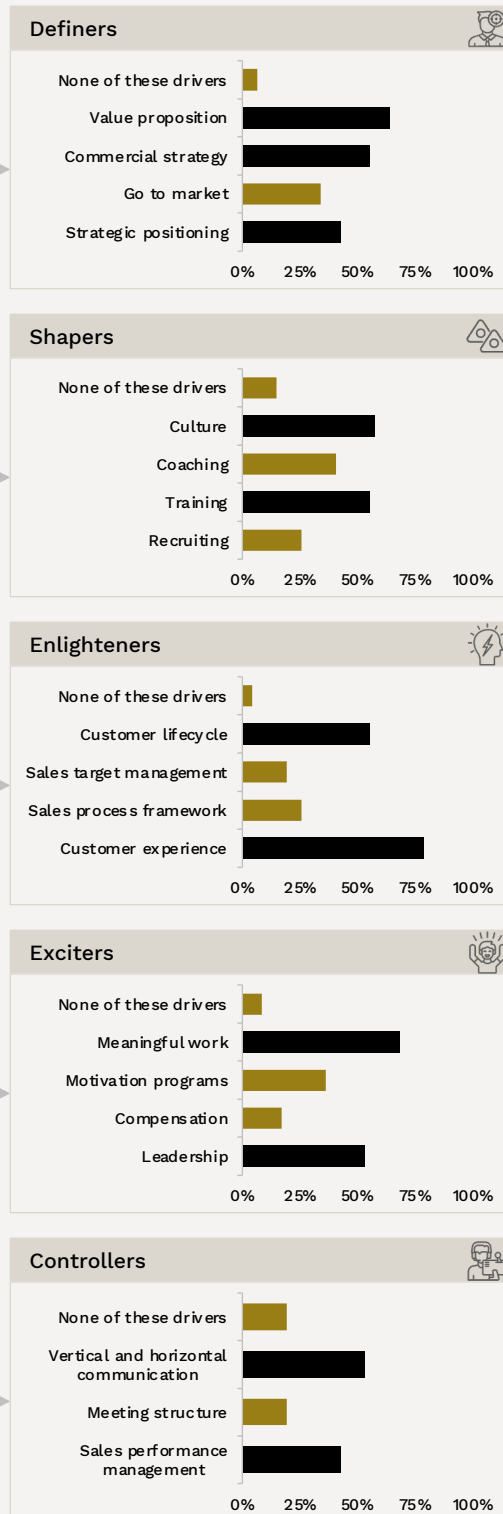
Underestimation and Potential

Employee well-being is often **underestimated**, despite its significant potential to boost productivity and overall company performance. Companies need to focus on fully understanding **what is needed** to support their employees' well-being, ensuring that the programs and initiatives they offer align with the actual needs of their workforce.

Sales Force Drivers
Clarification

Customer Experience Management (CXM)

Definers

- None of these drivers
- Value proposition
- Commercial strategy
- Go to market
- Strategic positioning

0% 25% 50% 75% 100%

Shapers

- None of these drivers
- Culture
- Coaching
- Training
- Recruiting

0% 25% 50% 75% 100%

Enlighteners

- None of these drivers
- Customer lifecycle
- Sales target management
- Sales process framework
- Customer experience

0% 25% 50% 75% 100%

Exciters

- None of these drivers
- Meaningful work
- Motivation programs
- Compensation
- Leadership

0% 25% 50% 75% 100%

Controllers

- None of these drivers
- Vertical and horizontal communication
- Meeting structure
- Sales performance management

0% 25% 50% 75% 100%

Impact of customer experience management on key sales force drivers

As customer expectations rise, customer experience management (CXM) is reshaping how sales organizations operate. The percentages shown in the graphs represent the impact of CXM on various sales force drivers, as highlighted by respondents in the survey.

A standout shift is occurring in the **value proposition**, where companies are reframing their offerings around seamless experience and customer value management, making it a core differentiator. This shift is mirrored in **commercial strategy**, where the focus moves from shorter-term revenue goals to building long-term customer satisfaction and customer lifetime value.

Strategic positioning also displays a significant impact, with companies increasingly positioning themselves as customer-centric to stay competitive. To support this, a strong customer-centric **culture** within the sales force is crucial, fostering deep commitment to understanding and exceeding customer needs.

Ongoing **training** is essential to equip sales teams to provide personalized interactions and problem resolution. As customer journeys become more complex, effective **customer lifecycle** management is critical to ensure long-term success.

Naturally, **customer experience** itself is central. It's now the foundation of sales force objectives, with the team expected to deliver outstanding service at every touchpoint. This aligns closely with the concept of **meaningful Work**, as sales teams find fulfilment in helping customers, improving motivation and performance.

Sales **leadership** must champion CXM initiatives, ensuring the team remains aligned with customer-centric goals. Finally, strong **vertical and horizontal communication** and enhanced **sales performance management** systems are needed to integrate customer feedback into performance metrics, making CXM an intrinsic part of how success is measured.

Impact

Trend ➤ Sales Force Drivers ➤ Clarification

Challenges
Customer Experience Management

Alongside the key trends and their impact on the sales force drivers, challenges are explored that sales and marketing executives face in adapting to and addressing changes when acting upon these trends.

Our analysis identified the following challenges as most important in addressing and adapting to the trend customer experience management:

- ❖ Customer Segmentation and Targeting
- ❖ Resource and Commitment Issues
- ❖ Operational and Process Complexity
- ❖ Retention and Customer Journey Focus
- ❖ Data, Personalization, and Technology Challenges
- ❖ Financial and ROI Concerns
- ❖ Becoming a Customer-Centric Leader

Customer Segmentation and Targeting
Sales and marketing people face significant hurdles when it comes to effectively segmenting customers and delivering tailored experiences. A major challenge is **differentiating customer segments** in a meaningful way to address specific needs. Further complicating this is the **identification of key drivers** for each segment — understanding what truly influences each group's buying behaviour. In addition, **finding the right market positioning** that resonates with various segments is essential but challenging, especially when diverse customer expectations come into play.

Resource and Commitment Issues
A key challenge for sales and marketing people is the **lack of organizational commitment** toward fully embracing customer experience improvements. Without strong leadership buy-in, it becomes difficult to gain momentum. Additionally, sales teams often struggle with **limited resources** — whether in terms of staffing, time, or focus — to effectively manage these initiatives. Furthermore, **resource allocation** can become a bottleneck, as companies find it difficult to dedicate the necessary financial, technological, and human resources toward enhancing the customer experience.

Operational and Process Complexity
Managing customer experience involves navigating a range of operational challenges. One of the main hurdles is the **speed of execution** — sales and marketing teams must be agile in their responses to customer needs. However, **the complexity of processes** — especially as companies scale — can slow down efforts to improve customer experience. Another key issue is **linking customer experience improvements with revenue growth**, as well as **getting third-party partners** to align with customer experience goals.

Retention and Customer Journey Focus
A major concern for commercial teams is ensuring that **customers don't get lost** during their journey with the company. Keeping them engaged and satisfied throughout the entire customer lifecycle is crucial. Building **customer loyalty** presents another challenge, as it requires long-term strategies to ensure repeat business and advocacy. Strengthening **sales relationships** with customers is a key part of the experience, helping to reinforce trust and engagement at every stage of the journey.

Data, Personalization, and Technology Challenges
Sales and marketing teams often struggle with **data integration** across systems to create personalized experiences. There's a growing need to leverage technology, such as **AI**, to deliver high-quality customer service without adding to the workforce. Another challenge is deriving **actionable insights** from customer data to improve experiences, which can be time-consuming and complex. Additionally, maintaining **regular customer feedback loops** through surveys is essential but often difficult to execute consistently.

Financial and ROI Concerns
For many organizations, the key challenge is understanding the **cost vs. ROI** of investing in top-tier customer experience initiatives. Justifying these investments requires clear, measurable returns, which can sometimes be difficult to quantify, especially in the early stages.

Becoming a Customer-Centric Leader
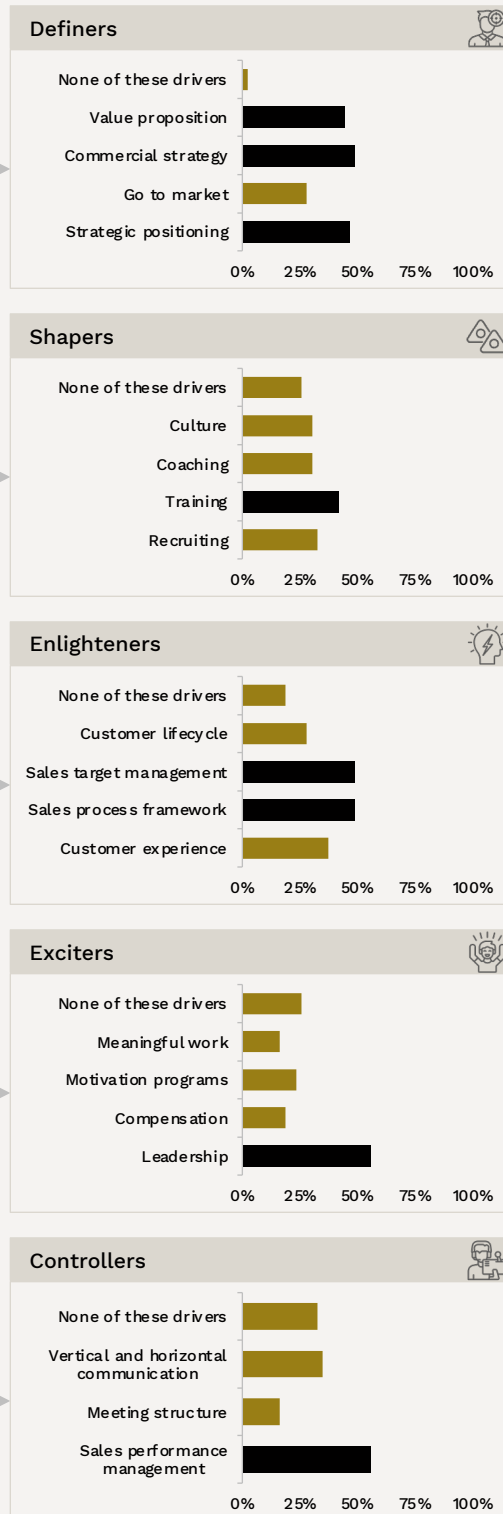Many sales and marketing people aspire to make their company the **supplier of choice** by delivering a superior customer experience. However, achieving this goal requires ongoing efforts to differentiate through service excellence, which can be challenging in a competitive market. The ability to stand out as the leader in customer-centricity is what will ultimately drive loyalty and preference.

Sales Force Drivers
Clarification

Data Drivenness and Big Data

Definers

None of these drivers	
Value proposition	
Commercial strategy	
Go to market	
Strategic positioning	

0% 25% 50% 75% 100%

Shapers

None of these drivers	
Culture	
Coaching	
Training	
Recruiting	

0% 25% 50% 75% 100%

Enlighteners

None of these drivers	
Customer lifecycle	
Sales target management	
Sales process framework	
Customer experience	

0% 25% 50% 75% 100%

Exciters

None of these drivers	
Meaningful work	
Motivation programs	
Compensation	
Leadership	

0% 25% 50% 75% 100%

Controllers

None of these drivers	
Vertical and horizontal communication	
Meeting structure	
Sales performance management	

0% 25% 50% 75% 100%

Impact of data drivenness and big data on key sales force drivers

The rise of **data drivenness and big data** *is fundamentally reshaping how companies approach sales. The percentages displayed in the graphs represent the impact of this trend on key sales force drivers, as identified by our respondents.*

A data-driven **value proposition** enables companies to offer more personalized solutions that directly address customer needs, giving them a unique advantage. This data-informed approach is also transforming **commercial strategy**, ensuring that strategic decisions are grounded in hard data rather than assumptions, leading to more effective and targeted sales strategies.

Companies that use data to guide their **strategic positioning** gain a competitive edge, as they can leverage insights into market trends, segmentation and customer behavior. Data empowers these organizations to stay ahead of competition by aligning their positioning with real-time market dynamics.

To capitalize on the potential of big data, **training** programs will need to focus heavily on data literacy. Sales teams must be equipped to interpret and apply data in their daily decision-making processes, allowing them to engage customers more effectively.

In **sales target management**, data plays a critical role in setting accurate, realistic targets and tracking progress. This helps sales teams concentrate on the most promising leads and opportunities, driving better results.

The **sales process framework** becomes more streamlined as data is used to optimize every stage of the sales process, from lead generation to closing deals. This refinement boosts efficiency and improves conversion rates.

Commercial leaders are crucial in fostering a data-driven mindset within their teams. **Leadership** must encourage the use of analytics to drive decisions, helping sales and marketing teams embrace the power of data in shaping strategies and outcomes.

Finally, **sales performance management** is evolving, with data providing detailed insights into both individual and team performance. This allows for more targeted improvements and ensures that resources are focused where they can deliver the most impact.

Trend ➡ Impact ➡ **Sales Force Drivers** ➡ **Clarification**

Challenges
Data Drivenness and Big Data

Alongside the key trends and their impact on the sales force drivers, challenges are explored that sales and marketing executives face in adapting to and addressing changes when acting upon these trends.

Our analysis identified the following challenges as most important in addressing and adapting to the trend data drivenness and big data:

❖ Translating Data into Actionable Insights
❖ Data Quality and Usability
❖ Knowledge and Expertise in Big Data
❖ Strategic Implementation and Investment
❖ Regulatory and Ethical Considerations
❖ Customer-Centric Data Utilization
❖ Data Infrastructure and Tools

Translating Data into Actionable Insights

One of the most pressing challenges is **converting vast amounts of big data into actionable insights** that can drive meaningful business decisions. It's not just about collecting data—it's about ensuring the organization can **turn that data into valuable information** and act on it. Additionally, there's the challenge of **understanding the connections between data points**, clarifying their benefits, and recognizing the added value these insights bring to the organization.

Data Quality and Usability

Ensuring **data quality and hygiene** is critical for extracting useful insights. Companies face difficulties in making sure the data collected is clean, accurate, and usable. Identifying which **data is most valuable and relevant** for business decisions is a challenge, especially with the risk of accumulating vast amounts of unusable information. Another key hurdle is structuring data in a way that helps **develop the right KPIs** to drive the organization toward its goals.

Knowledge and Expertise in Big Data

A significant barrier to effectively utilizing big data is the **lack of expertise in how to implement solutions**. Many organizations still face a general **knowledge gap** when it comes to understanding the full potential of big data technologies. To keep up with rapidly evolving trends, companies need to **accelerate their learning** and continually **explore new methods** of leveraging big data effectively.

Strategic Implementation and Investment

Successfully implementing big data requires **strategic investment** and collaboration with the right partners. Moving from **concept to execution** is a significant challenge, often requiring substantial organizational resources and commitment. Additionally, developing **business models based on big data** is a key challenge, as it requires companies to rethink their operations and strategies.

Regulatory and Ethical Considerations

Navigating the **regulatory framework** around big data is a critical challenge, especially in industries with stringent data privacy requirements. Organizations must ensure they comply with legal guidelines while fully utilizing their data to avoid potential ethical and legal complications.

Customer-Centric Data Utilization

Another challenge is **implementing tools that use data to trigger customer demand**, allowing organizations to better understand and influence customer behavior. Improving **customer interactions at the contact level** is essential for personalized, data-driven engagement. Finally, finding ways to **monetize data insights** by offering them as value-added services to customers can be difficult, as companies need to ensure the right pricing strategies are in place.

Data Infrastructure and Tools

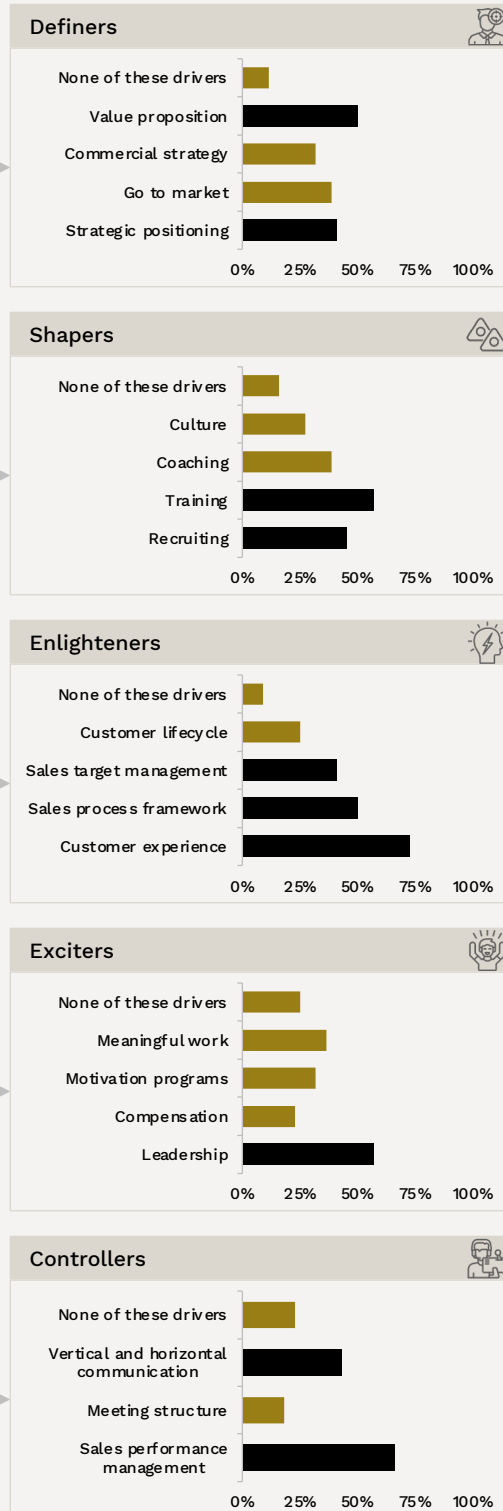Building and maintaining the right **data infrastructure** is key to effectively managing and utilizing big data. Many organizations are focused on developing **data lakes** to store large amounts of information for future analysis. In addition, selecting and developing the right **tools to manage and drive business intelligence** using big data is essential for leveraging this resource effectively.

Sales Force Drivers
Clarification

Artificial Intelligence (AI)

Definers

Driver	Value
None of these drivers	~12%
Value proposition	~50%
Commercial strategy	~32%
Go to market	~38%
Strategic positioning	~42%

(Scale: 0% 25% 50% 75% 100%)

Shapers

Driver	Value
None of these drivers	~18%
Culture	~28%
Coaching	~38%
Training	~55%
Recruiting	~48%

(Scale: 0% 25% 50% 75% 100%)

Enlighteners

Driver	Value
None of these drivers	~10%
Customer lifecycle	~25%
Sales target management	~45%
Sales process framework	~52%
Customer experience	~72%

(Scale: 0% 25% 50% 75% 100%)

Exciters

Driver	Value
None of these drivers	~25%
Meaningful work	~35%
Motivation programs	~30%
Compensation	~22%
Leadership	~55%

(Scale: 0% 25% 50% 75% 100%)

Controllers

Driver	Value
None of these drivers	~22%
Vertical and horizontal communication	~45%
Meeting structure	~18%
Sales performance management	~62%

(Scale: 0% 25% 50% 75% 100%)

Impact of artificial intelligence on key sales force drivers

Artificial Intelligence (AI) is rapidly transforming how sales organizations operate. The graphs on this page show the percentages representing the impact of AI on critical sales force drivers, according to our survey respondents.

AI is revolutionizing the **value proposition** by enabling companies to offer more personalized, tailored solutions. This positions AI-powered businesses as innovative leaders in customer experience and efficiency. Similarly, **strategic positioning** is heavily influenced, with companies leveraging AI to differentiate themselves as forward-thinking, innovators and technologically advanced.

To fully harness AI potential, **training** programs must now focus on building data literacy and tech proficiency within sales teams, ensuring they can use AI tools effectively. **Recruiting** has also evolved, as AI automates candidate screening and helps attract tech-savvy talent, ensuring the sales force is equipped for the future.

AI is a game-changer in enhancing the **customer experience**, delivering personalized recommendations, automating routine tasks, and ensuring data-driven, timely customer interactions. It also optimizes the **sales process framework** by automating repetitive tasks like lead scoring and follow-ups, allowing salespeople to focus on more strategic, high-value activities. Furthermore, AI supports **leadership** by providing actionable insights, enabling leaders to make more informed, data-driven decisions that improve team performance and align strategies with evolving customer needs

In **sales target management**, AI enables more accurate goal-setting by analyzing historical data and providing real-time insights. This enhances performance tracking and ensures that targets reflect actual market dynamics. Likewise, AI is transforming **sales performance management** by delivering continuous data on sales activities, helping leaders identify top performers and coach on improvement areas.

Finally, AI strengthens **vertical and horizontal communication** by automating the sharing of insights and reports, ensuring transparency and better alignment across teams.

Challenges
Artificial Intelligence

Alongside the key trends and their impact on the sales force drivers, challenges are explored that sales and marketing executives face in adapting to and addressing changes when acting upon these trends.

Our analysis identified the following challenges as most important in addressing and adapting to the trend Artificial Intelligence:

❖ Leadership and Strategic Guidance
❖ Knowledge and Expertise Gaps
❖ Starting and Building AI Solutions
❖ AI and Market Development
❖ Regulatory and Ethical Considerations
❖ Data Management and Integration

Leadership and Strategic Guidance

A major challenge for organizations is ensuring that **leadership understands and supports AI initiatives**. Effective **management of AI projects**, from inception to execution, is also a key hurdle, as aligning these efforts with business objectives can be difficult. Additionally, sales and marketing teams often struggle with **convincing both leadership and the market** of the value and potential of AI, especially in B2B sectors where adoption is slower. Leadership's **lack of direct experience** with AI further complicates this, often leading to cautious or experimental approaches.

Knowledge and Expertise Gaps

The rapid evolution of AI technology has created significant **knowledge and expertise gaps** within many organizations. The need for **AI experts** with the right skill sets is growing, as companies often lack the necessary **AI-related knowledge** to drive innovation. Many are still in the **early stages of exploring AI**, limiting their ability to advance quickly. Additionally, there's a critical gap in **practical know-how**, particularly when it comes to implementing AI solutions effectively and **processing new AI knowledge quickly** in an evolving market.

Starting and Building AI Solutions

A common challenge is determining **where and how to start with AI initiatives**. Many organizations find it difficult to **build AI products** from the ground up and **integrate them with existing systems**. Ensuring that AI solutions are **pragmatic** and solve real-world problems, rather than being purely experimental, is another significant hurdle. Companies struggle to **build, test, and evaluate AI products quickly** and to identify the **right tools and technologies** to do so. In most cases, businesses are still in the **exploratory phase**, searching for the best opportunities to implement AI.

AI and Market Development

The **speed of AI development**, especially in relation to **data ownership** issues, presents a challenge for companies trying to keep up. Staying **up-to-date with AI advancements** is crucial to remaining competitive, but many organizations find it difficult to maintain this pace. Additionally, there's pressure to balance **time-to-market** considerations with the need to properly develop and test AI products. While AI's value is increasingly evident in **B2C applications**, its potential in **B2B sectors** remains underexplored, adding complexity to market development efforts.

Regulatory and Ethical Considerations

Navigating **complex regulatory frameworks** that govern AI is a significant challenge, especially in industries where data privacy and compliance are critical. Organizations must ensure they **fully understand the potential applications** of AI, particularly in highly regulated industries, where misuse of AI could lead to legal or ethical complications.
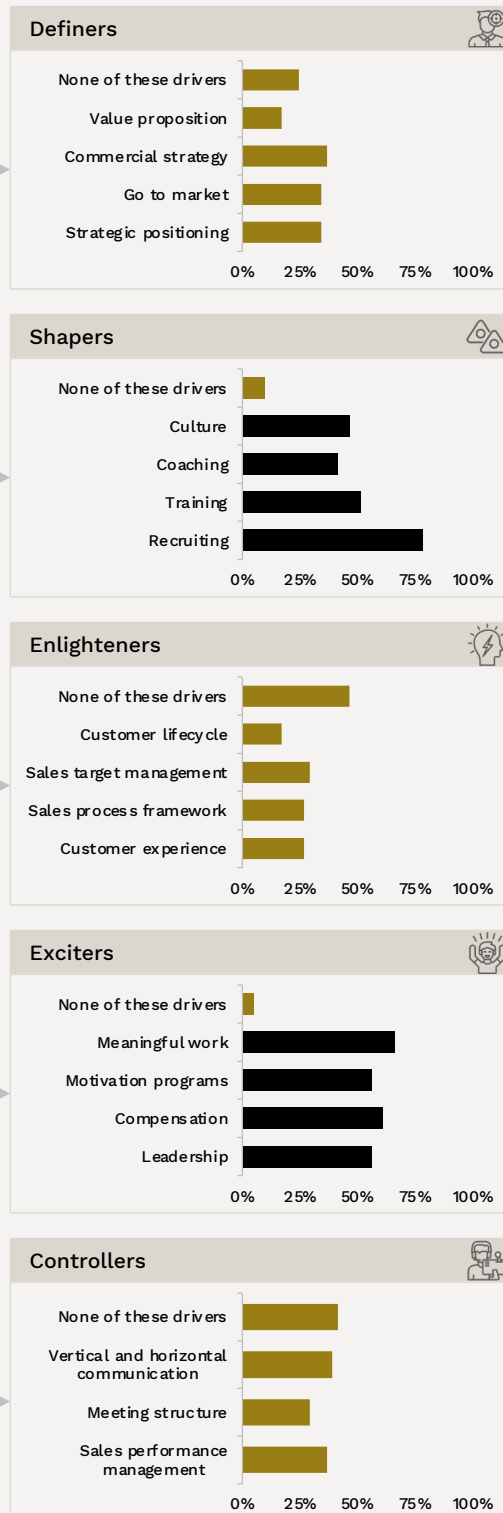
Data Management and Integration

Data management remains a major obstacle to AI success. Companies must effectively handle large volumes of **big data** and ensure it is structured and accessible for AI models. Additionally, concerns about **data ownership** and access often hinder the seamless integration of AI solutions, complicating their development and implementation.

Sales Force Drivers
Clarification

Tight Labor-Market

Definers

- None of these drivers
- Value proposition
- Commercial strategy
- Go to market
- Strategic positioning

0% 25% 50% 75% 100%

Shapers

- None of these drivers
- Culture
- Coaching
- Training
- Recruiting

0% 25% 50% 75% 100%

Enlighteners

- None of these drivers
- Customer lifecycle
- Sales target management
- Sales process framework
- Customer experience

0% 25% 50% 75% 100%

Exciters

- None of these drivers
- Meaningful work
- Motivation programs
- Compensation
- Leadership

0% 25% 50% 75% 100%

Controllers

- None of these drivers
- Vertical and horizontal communication
- Meeting structure
- Sales performance management

0% 25% 50% 75% 100%

Impact of the tight labor-market on key sales force drivers

*The **tight labor-market** is creating significant challenges for sales organizations, as highlighted by respondents. The percentages in the graphs show the impact of this trend on key sales force drivers.*

Recruiting has become a critical concern, with companies competing fiercely for a limited talent pool. To attract top candidates, organizations are enhancing compensation packages, offering better benefits, and building a stronger employer brand. With fewer new hires available, businesses are shifting their focus to **training** and upskilling their current workforce, ensuring their sales teams can meet evolving demands.

Coaching is also playing a larger role in this environment, as effective coaching helps ensure that each salesperson reaches their full potential and stays engaged in their role. Meanwhile, fostering a positive **culture** is essential for retaining talent, with companies emphasizing inclusivity and employee satisfaction to reduce turnover.

Strong **leadership** is more important than ever in a tight labor-market. Leaders must motivate and retain their existing workforce while managing with fewer resources. They are also tasked with finding creative solutions to keep teams productive despite a limited headcount.

In addition to competitive **compensation** packages, companies are redefining **motivation programs** to focus on non-monetary rewards, such as career development opportunities and recognition initiatives. These programs are designed to keep employees engaged and motivated in a challenging talent landscape.

Moreover, the trend highlights the growing importance of **meaningful work**. In a tight labor-market, employees seek fulfilment, and companies must ensure that their sales teams feel valued and engaged in work that offers a sense of purpose.

Interestingly, the sales force drivers from the **definers**, **enlighteners** and **controllers** clusters were not significantly impacted by the tight labor-market, according to the respondents. This suggests that while talent acquisition and retention remain critical, the strategic, operational and informational processes behind the sales force are less affected.

Impact

Trend → **Sales Force Drivers** → **Clarification**

Challenges
Tight Labor-Market

Alongside the key trends and their impact on the sales force drivers, challenges are explored that sales and marketing executives face in adapting to and addressing changes when acting upon these trends.

Our analysis identified the following challenges as most important in addressing and adapting to the trend tight labor-market:

❖ Recruitment and Talent Acquisition
❖ Employer Branding and Differentiation
❖ Compensation, Benefits, and Rewards
❖ Onboarding and Retention
❖ Competition with Other Sectors
❖ Market and Economic Pressures

Recruitment and Talent Acquisition

One of the primary challenges in a tight labor-market is **recruiting the right commercial team members** while ensuring they stay and grow within the organization. Limited budgets make it harder to **compete for top talent**, and attracting qualified candidates is becoming increasingly difficult. Finding candidates with the **right skills** and expertise is an ongoing concern, as many companies struggle to locate **skilled resources**. Additionally, some organizations may lack modern **recruitment know-how**, making it harder to attract the right talent.

Employer Branding and Differentiation

In a competitive labor-market, building a stronger **employer brand** is essential for standing out. Companies aim to become the **employer of choice**, but many lack **differentiators** to make them attractive to top talent. To appeal to skilled candidates, organizations need to enhance their **employer branding** efforts, positioning themselves as desirable and unique employers in the eyes of potential hires.

Compensation, Benefits, and Rewards

Ensuring **competitive remuneration** is a growing challenge, as wages continue to rise due to high demand for talent. Balancing competitive **compensation packages** with location constraints can make it difficult to attract talent, particularly in less desirable regions. Companies are also facing pressure to offer the right mix of **financial compensation (hard rewards)** and **non-monetary benefits (soft rewards)**, all while managing tight **budgets**. The **increased costs and market competition** for talent further exacerbate these challenges.

Onboarding and Retention

Once talent is recruited, **effective onboarding** becomes crucial to ensure quick integration and reduce early turnover risks. However, **retaining talent** is an even bigger challenge, as competitive pressures in the labor-market make it easy for employees to move on to better opportunities elsewhere.

Competition with Other Sectors

Organizations are finding it tough to **compete with more attractive sectors** that may offer higher pay, better benefits, or stronger career growth prospects. Balancing the need for experienced candidates with the **price and availability** of such talent is a persistent challenge, especially when competing with industries that are perceived as more lucrative.

Market and Economic Pressures

For many businesses, the tight labor-market is an ongoing reality that has intensified over the last two years. These market pressures require continual adaptation, as organizations must find new ways to secure talent in an environment where **economic conditions** remain difficult.

Urgency and Engagement

To understand how proactive commercial leaders and executives are responding to current market trends, we asked whether their organizations are already engaged in initiatives to adapt to or address these trends, compared to the level of urgency required to make changes within their organizations. The results provide insight into the organization's readiness and action levels.

The findings indicate that a significant number of organizations are taking proactive steps to address the identified key trends. However, a large share of organizations (range from 32-51%) still need to engage urgently (within 1 year) on these strategic trends with clear action plans.

Employee Well-Being

	Passively engaged	Actively engaged
Essential urgency < 1 year	Critical need for immediate action **32,0%**	Proactive and prepared **38,0%**
Secondary urgency 1-3 year	Low priority or minimal current impact **10,0%**	Possibly overinvesting or acting early **20,0%**

Tight Labor-Market

	Passively engaged	Actively engaged
Essential urgency < 1 year	Critical need for immediate action **36,6%**	Proactive and prepared **36,6%**
Secondary urgency 1-3 year	Low priority or minimal current impact **17,0%**	Possibly overinvesting or acting early **9,8%**

Customer Experience Management

	Passively engaged	Actively engaged
Essential urgency < 1 year	Critical need for immediate action **40,4%**	Proactive and prepared **36,2%**
Secondary urgency 1-3 year	Low priority or minimal current impact **17,0%**	Possibly overinvesting or acting early **6,4%**

Artificial Intelligence

	Passively engaged	Actively engaged
Essential urgency < 1 year	Critical need for immediate action **34,1%**	Proactive and prepared **38,6%**
Secondary urgency 1-3 year	Low priority or minimal current impact **25,0%**	Possibly overinvesting or acting early **2,3%**

Data Drivenness and Big Data

	Passively engaged	Actively engaged
Essential urgency < 1 year	Critical need for immediate action **51,2%**	Proactive and prepared **30,2%**
Secondary urgency 1-3 year	Low priority or minimal current impact **18,6%**	Possibly overinvesting or acting early **0,0%**

Survey Demographics

Country	
Germany	14,9%
France	2,6%
Italy	1,8%
Spain	2,6%
Poland	2,6%
Netherlands	58,8%
Belgium	7,0%
Austria	0,9%
Denmark	0,9%
United Kingdom	0,9%
Hungary	0,9%
Switzerland	0,9%
Czech Republic	0,9%
Finland	0,9%
United States	0,9%
Ireland	2,6%

Industry	
Wholesale and distribution	27,2%
Manufacturing and industrial goods	17,5%
Software, internet, and technology services	12,3%
Construction and engineering	1,8%
Healthcare and life sciences	10,5%
Energy and utilities	0,9%
Telecommunications	2,6%
Logistics and supply chain	7,0%
Professional services	13,1%
Chemicals and materials	1,8%
Other	5,3%

Company size in number of employees	
0-10	9,7%
11-50	22,8%
51-250	30,7%
251-1000	15,8%
1001-10.000	14,0%
10.001 or more	7,0%

Job seniority	
Entry level	0,0%
Middle management	10,5%
Senior management	40,4%
C-level	49,1%

Responsibility	
Sales	40,4%
Marketing	0,9%
General management	57,0%
Other	1,8%

Annual Revenue	
Less than €1 million	8,8%
€1 million - €10 million	20,2%
€10 million - €100million	36,8%
€100 million - €1 billion	23,7%
More than €1 billion	10,5%

Target market	
B2B	93,0%
B2C	7,0%

Age Group	
0-25 years	0,0%
26-45 years	21,1%
46-60 years	69,3%
Over 60 years	9,7%

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