The ROI of Voice AI in Field Sales

A ***CFO-Ready Guide*** to Quantifying the Business Case for Data Capture and Training Reinforcement

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Executive Summary

> *Sales leaders are under constant pressure to prove results. CFOs and boards demand measurable ROI, not promises.*

This white paper shows how to calculate the financial impact of four big problems in field sales: lost selling time, bad CRM data, training decay, and inaccurate forecasts. It also demonstrates how voice AI — like June — closes those gaps with measurable returns.

We'll walk through:

- The hidden costs every sales org faces.
- Why CRM alone doesn't fix them.
- A four-lever ROI framework any finance leader will recognize.
- Real-world scenarios for teams of 12, 28, and 65 reps.
- A step-by-step guide to building your own ROI case.

By the end, you'll have a framework that a VP of Sales can use with confidence — and that a CFO can respect.

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The Hidden Costs in Field Sales

> *Every hour of admin is an hour not selling.*

Every sales organization knows the pain. Few quantify it.

Time leak on non-selling tasks.

Reps spend only 28% of their time actually selling.[1] The rest is CRM updates, meetings, and admin. In field sales roles, it's even worse — just 38% selling time and 62% spent elsewhere.[2] That means for every dollar spent on a rep, more than half funds non-selling work.

Bad data penalties.

1 in 3 deals never makes it into CRM.[3] When they do, critical fields are often missing. Untrusted or incomplete CRM data costs U.S. businesses about $3.1 trillion annually.[4] Research shows 15–30% of revenue is often eroded by poor data hygiene, missed contacts, or lack of visibility.[5]

Training decay.

Sales organizations spend heavily on training, but 70% of new skills are forgotten within 30 days without reinforcement.[6] Under pressure, reps default to old habits. The "forgetting curve" is unforgiving.

Forecast misses

72% of sales leaders say their forecasts miss by more than 10%.[7] For a board, that's not just a metric — it's a credibility gap. CFOs can't allocate capital effectively when forecasts are unreliable.

Add these up, and the true cost is an issue. Missed details lead to missed deals. Bad data leads to bad decisions. Training slippage wastes millions. And forecasts built on weak inputs create surprises at the worst time.

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(SIDEBAR STORY:)

“The Missed Budget Owner”

A regional sales rep closed a strong discovery call with a prospect worth six figures. They captured needs, timelines, and even budget range — but forgot to note who actually owned the budget. By the time leadership reviewed the deal, the rep couldn’t recall the detail. It never made it into Salesforce. The competitor asked the right question, uncovered the budget holder, and won the deal.

That single slip cost more than $100,000 in revenue.

With voice AI, this scenario looks different. Right after the meeting, an AI Voice assistant could ask: “Who is the budget decision-maker?” The answer could have been logged in the CRM within minutes, and saved the deal.)

Why CRM Alone Doesn’t Solve It

CRM systems were built to capture data, not to improve how reps sell.

- They log outcomes — deal stage, amount, close date — but not process quality.
- Pipeline reviews catch errors late, often after deals are already lost.
- Coaching depends on whatever crumbs reps enter, not what actually happened on the call.

This is where voice AI changes the game:

1. Reps speak a 60–90 second recap right after the call.
2. AI parses the recap into structured data: names, roles, amounts, dates, next steps.
3. If something critical is missing — like budget authority — it prompts for it.
4. Within minutes, summaries and tasks flow into CRM.

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No typing. No delays. No forgetting. Just clean, structured data that improves both coaching and forecasting.

The ROI Framework

> *Boards and CFOs don't want hype. They want math.*

We break ROI into four measurable levers that any finance leader can recognize:

1. Time Savings ROI
   - Every hour a rep spends typing in CRM is an hour not selling.
   - Formula:

     Admin Cost Saved = N × H × W × C

     Where, N = reps, H = hours saved per week, W = working weeks/year, C = fully-loaded hourly cost.

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2. Win Rate ROI
    - Even small gains multiply quickly.
    - Formula:

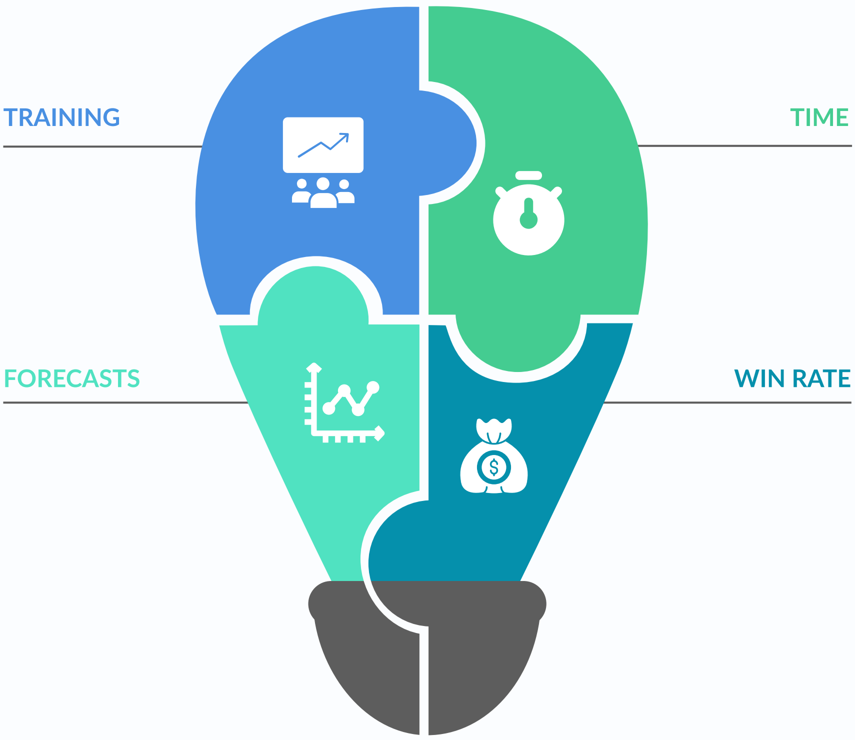
Revenue Lift = N × (R × U)

Where R = bookings per rep/year, U = win-rate improvement %.

3. Forecast Accuracy ROI
    - Cleaner, faster data reduces forecast variance.
    - Harder to dollarize, but CFOs understand: fewer surprises mean better decisions.

4. Training ROI
    - Reinforcement makes training stick.
    - Faster ramp for new hires, better consistency for veterans.
    - Converts wasted spend into performance lift.

4-box ROI model



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(SIDEBAR STORY:)

The Training Gap

A manufacturer invested heavily in SPIN training for their field reps. For the first few weeks, questions improved. By week six, most reps had slipped back into old habits. Coaching reviews caught the issue late — too late to save deals in the pipeline.

With voice AI, the training doesn't fade. After every call, reps are prompted if a SPIN question is missing. Instead of training being a sunk cost, it became a living process — reinforced daily in the field.

Sample ROI Scenarios

Here's how the math plays out for three realistic team sizes.

Assumptions:

- H = 3 hrs saved per rep/week (conservative)
- W = 48 weeks/year
- C = $75/hr fully-loaded
- Platform cost = $2,388 per rep/year + $12,900 setup
- Average bookings per rep = $1.2M/year
- Gross margin = 50%
- Win-rate lift modeled at +3%

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A. Small Team — 12 Reps

- Admin Cost Saved = 12 × 3 × 48 × $75 = $129,600
- Software Cost = (12 × $2,388) + $12,900 = $41,556
- Net Labor ROI = $88,044

Upside: Contribution Lift = 12 × ($1.2M × 0.03) × 0.5 = $216,000
Total ROI ≈ $304,044 in Year 1

B. Mid Team — 28 Reps

- Admin Cost Saved = 28 × 3 × 48 × $75 = $302,400
- Software Cost = (28 × $2,388) + $12,900 = $79,164
- Net Labor ROI = $223,236

Upside: Contribution Lift = 28 × ($1.2M × 0.03) × 0.5 = $504,000
Total ROI ≈ $727,236 in Year 1

C. Larger Team — 65 Reps

- Admin Cost Saved = 65 × 3 × 48 × $75 = $702,000
- Software Cost = (65 × $2,388) + $12,900 = $170,220
- Net Labor ROI = $531,780

Upside: Contribution Lift = 65 × ($1.2M × 0.03) × 0.5 = $1,170,000
Total ROI ≈ $1.7M in Year 1

- (Graphic idea: Bar chart comparing ROI across 12, 28, and 65 reps.)

> *A 28-rep team clears $727k in ROI Year 1 — before counting win-rate lift.*

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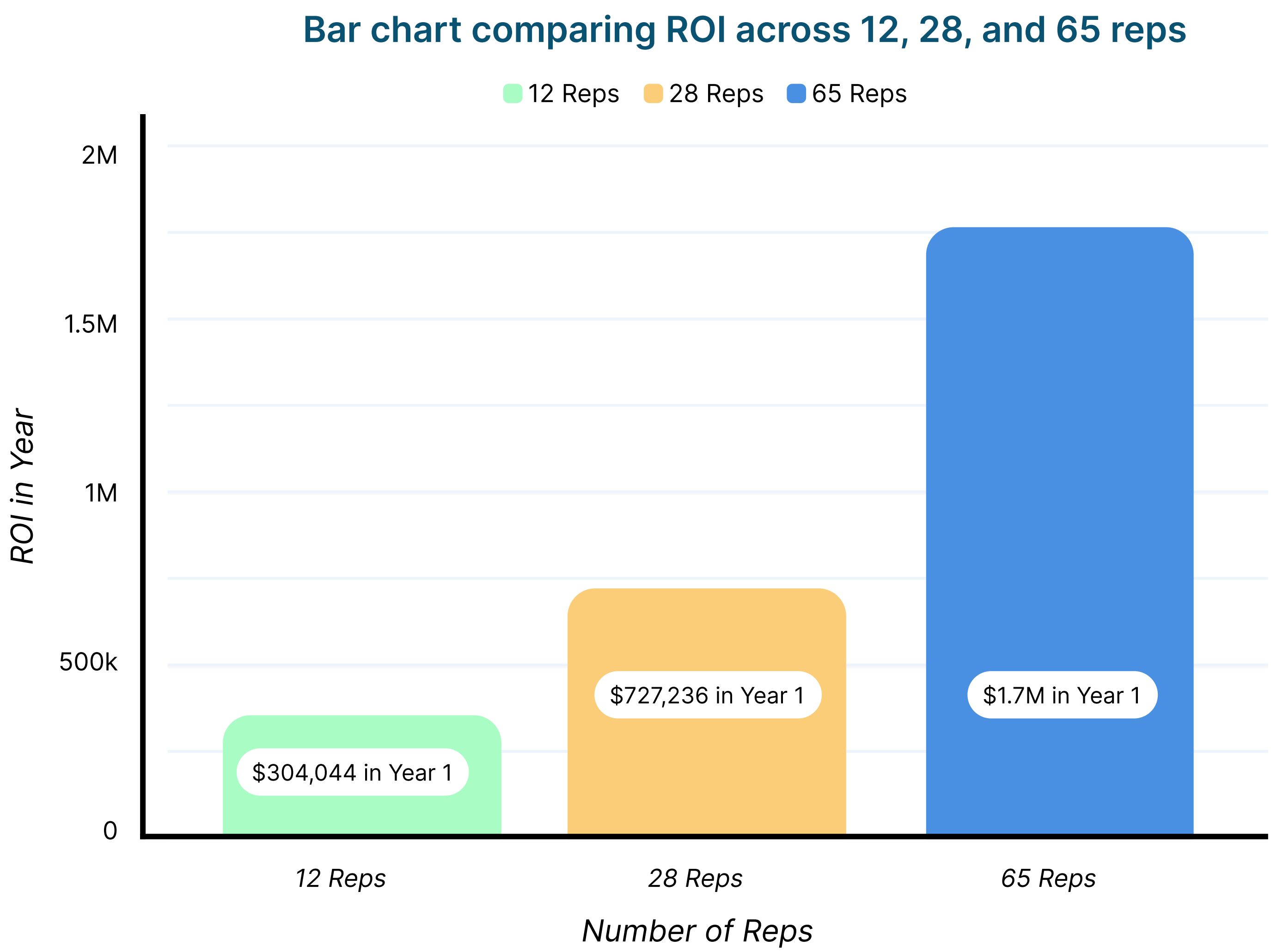

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Sensitivity Analysis — What CFOs Will Ask

> *Boards and CFOs always push assumptions. That's healthy.*

- **What if reps only save 2 hrs/week?**
  → 12-rep team still nets $29k ROI in Year 1.
- **What if rep costs are lower ($50/hr)?**
  → ROI remains positive. Efficiency gains still cover platform costs.
- **What if win-rate lift is 0%?**
  → The time savings alone justify the investment.

That's why this model is board-safe. Even under conservative assumptions, the ROI stands.

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Why It Matters for Finance and the Board

> *Voice AI doesn't replace CRM. It makes CRM finally deliver*

For CFOs and boards, the value is clear:

Efficiency:
Lower cost-per-sale through time savings.

Growth:
Higher win rates mean more revenue on the same pipeline.

Predictability:
Cleaner data reduces forecast misses.

Capital-light investment:
Fast payback (60–90 days), no disruptive overhaul.

Voice AI doesn't replace CRM. It makes CRM — and every dollar spent on reps and training — finally deliver its promised value.

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Addendum: Step-by-Step ROI Guide

Not a calculator. Not a spreadsheet. Just a simple way for any VP to run the math.

Step 1. Time Savings

- Estimate how many hours/week reps spend on admin.
- Conservative: 2 hrs. Expected: 3–5 hrs.
- Multiply: **Reps × Hours × 48 weeks × Hourly cost.**

Step 2. Net ROI (Labor Only)

- Subtract: platform cost ($2,388 per rep/year + $12,900 setup).
- Result: Net Labor ROI.

Step 3. Win-Rate Lift (Optional Upside)

- Start conservative: 2–3% improvement.
- Multiply: **Bookings/rep × Lift × Margin × Number of reps.**

Step 4. Add It Up

- Net Labor ROI + Contribution Lift = Total ROI.

Step 5. Pressure-Test It

- Drop assumptions (hours, salaries, win rate).
- ROI still holds in conservative cases.

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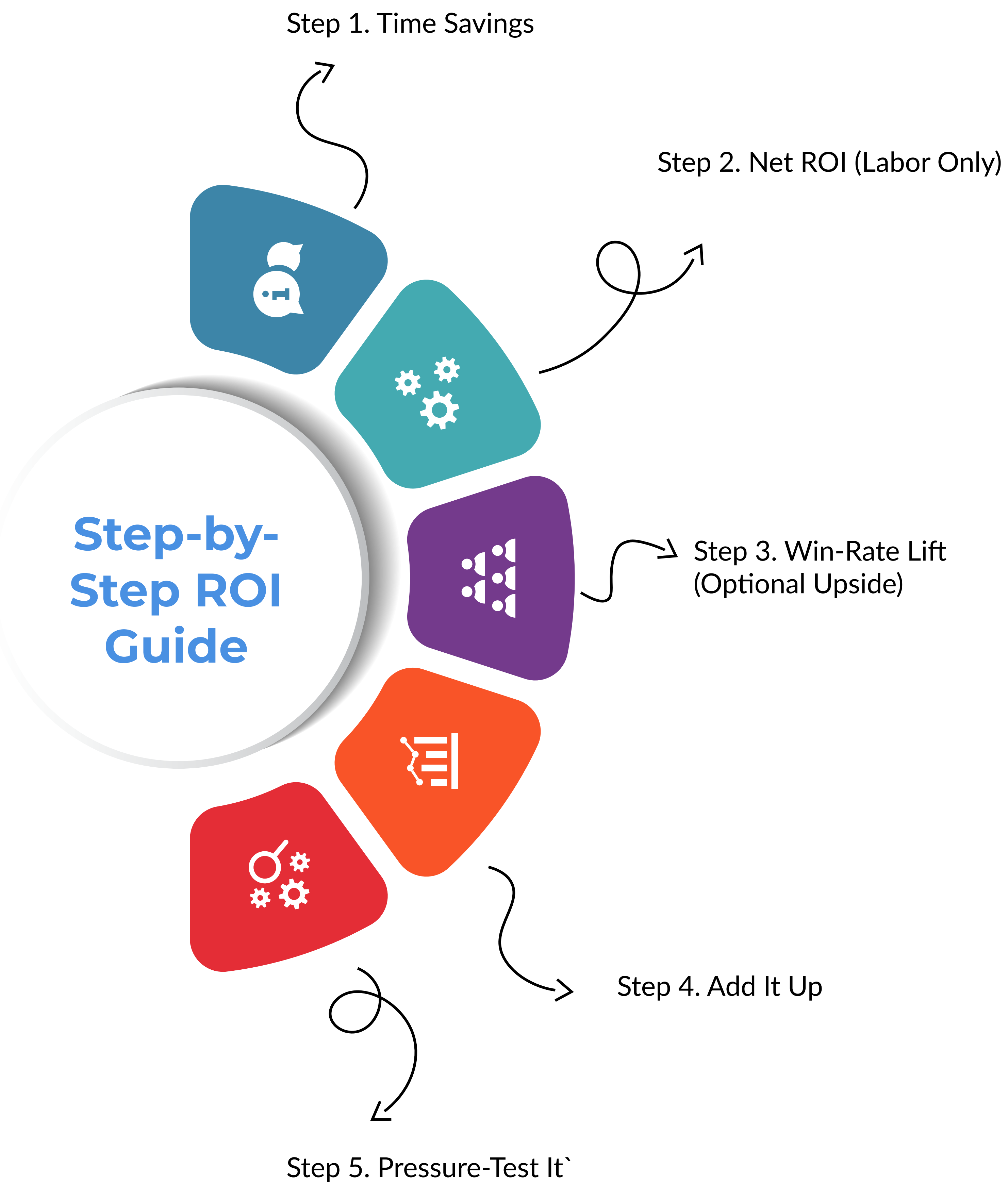

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