In This Issue

**Featured Insight**
CSO Priorities Heading Into 2021

4 Questions You Should Ask to Ensure a Successful Virtual Sales Kickoff

Effective Virtual Selling in a New Buying Environment

Infographic: Which Sales Force Sizing Method Is Right for You?

Connecting Innovation and Sales for the Future, With JLL’s Steve Ramseur
The Chief Sales Officer

Contents

CSO Priorities Heading Into 2021 4

4 Questions You Should Ask to Ensure a Successful Virtual Sales Kickoff 9

Effective Virtual Selling in a New Buying Environment 15

Infographic: Which Sales Force Sizing Method Is Right for You? 18

Connecting Innovation and Sales for the Future, With JLL’s Steve Ramseur 20

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The Chief Sales Officer is a quarterly publication that shares the latest insights on leading and managing the sales function. In this issue, we explore how CSOs can successfully conduct year-end strategic planning efforts and start 2021 strong.

As we enter the last quarter of 2020, chief sales officers (CSOs) are focused on closing the year strong and planning their strategies to win in 2021. This year has not been normal; however, many sales teams have shown incredible resilience. Things that once seemed impossible have now been achieved, such as moving entire sales forces to remote work.

In this issue of The Chief Sales Officer, we focus on moving further into the “recovery” phase of the postpandemic reset. We include insights and strategies to help CSOs address the immediate and long-term consequences of managing remote sales teams and engaging highly disrupted buying groups as you enter 2021. For example, soon many CSOs will likely host virtual sales kickoffs. You need to know what changes are critical to plan for and execute a successful virtual sales kickoff. Longer-term, CSOs must assess a new normal of virtual customer engagement when determining the right investments and changes to make in their go-to-market strategy and sales force design.

To provide guidance that helps CSOs tackle these pressing challenges, this issue of The Chief Sales Officer presents a number of recommendations and actions for CSOs to consider, including:

**Insights into CSO priorities going into 2021 (Page 4)** — As 2020 comes to an end, we share your CSO peers’ top priorities, which include building a new sales pipeline and enabling virtual selling, and expectations for budget changes to support those priorities.

**Guidance for holding a successful virtual sales kickoff (Page 9)** — We provide a summary of what CSOs need to know to ensure the successful transition from an in-person to a virtual sales kickoff event.

**A framework for virtual selling (Page 15)** — With many CSOs considering or planning to permanently shift field sales to virtual sales roles, we offer a framework to help you develop an effective virtual sales strategy.

**Strategies to rightsize your salesforce (Page 18)** — We share five strategies that CSOs should consider for optimizing seller investments as a part of strategic planning efforts for 2021.

**A peer’s perspective on innovating and the future of sales (Page 20)** — In this interview, Steve Rasmeur, chief innovation officer at JLL, talks about boldly transforming how companies lease commercial real estate into a compelling seller-driven, virtual experience.

We hope this issue helps as you think through key sales force design decisions to prepare for extended COVID-19-driven disruption and any potential rebound in 2021.

Stay healthy,
David Millstein
CSO Priorities Heading Into 2021
By Abhishek Sengupta

Facing continued market disruption and more conservative customer decision making, CSOs are focusing on new sales pipelines and enabling virtual selling as two key priorities going into 2021. Chief sales officers can use this research to learn about changes to their peers’ priorities and budgets.
The onset of COVID-19 was marked by many operational shutdowns and travel restrictions aimed at curtailing its spread. This resulted in a business environment largely characterized by budget and cash flow freezes, with B2B buyers reluctant to invest in long-term projects and looking for payment flexibility from sellers. Consequently, this stymied demand cascaded through the business ecosystem with each struggling seller creating another hesitant buyer. Chief sales officers (CSOs) responded quickly to transition sales forces to selling remotely/virtually. Now, the question for CSOs is this: “Given protracted uncertainty, how do we move from responding to the crisis to planning for a recovery and renewal of our business in 2021?”

To help answer this question, this article highlights the findings of a survey of CSOs and sales leaders about their priorities heading into 2021 and Gartner recommended actions to support those priorities. Our survey results uncovered two key assumptions grounding CSO priorities for the next six months. First, most CSOs expect buyers’ conservative decision making to continue. Second, CSOs also believe changed purchase behaviors stemming from the increased use of virtual platforms to be a significant business environment change to affect sales performance (see Table 1).

While observing notable changes in the business environment, CSOs are also making assumptions (or have already been told by finance) that their budgets will shrink for the upcoming year. Forty-five percent of respondents to our CSO Priorities Pulse Survey expect sales budgets to decrease for 2021 as compared to 2020 (see Figure 1).

### Table 1: Sales Leader Rank Ordering of Changes Impacting Their Business in the Next Six Months

<table>
<thead>
<tr>
<th>Rank</th>
<th>Changes Impacting Business</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Conservative customer decision making resulting from economic uncertainty</td>
</tr>
<tr>
<td>2</td>
<td>Shifting buyer preferences, behaviors and decision making resulting from virtual/remote working</td>
</tr>
<tr>
<td>3</td>
<td>Increased customer expectations of digital learning and buying channels (e.g., digital content, website and, if applicable, e-commerce)</td>
</tr>
<tr>
<td>4</td>
<td>Decreased seller engagement levels resulting from economic uncertainty</td>
</tr>
<tr>
<td>5</td>
<td>Shifting buyer preferences, behaviors and decision making resulting from increased digital learning/less seller engagement</td>
</tr>
<tr>
<td>6</td>
<td>Changing customer stakeholders resulting from customer downsizing/restructuring</td>
</tr>
</tbody>
</table>

n = 68
Source: 2020 Gartner CSO Priorities Pulse Survey
Strained budgets greatly pressure resources available to CSOs and make it crucial for them to correctly identify the most impactive initiatives to invest in. Based on survey responses, renewed focus on new customer acquisition and development of virtual seller capabilities are considered the two most crucial initiatives for sales organizations’ success, heading into 2021 (see Figure 2).¹

**Renewed Focus on New Customer Acquisition**

In the immediate aftermath of COVID-19-related disruptions, most sellers scrambled to close already advanced deals and doubled down on existing customers. While this seemed a reasonable response to the softening demand,

![Figure 2: CSOs’ Perception of Initiatives in Impacting Sales Success](image-url)

**What are the top three initiatives that you would classify as most critical to the success of your sales organization over the next six months?**

<table>
<thead>
<tr>
<th>Initiative</th>
<th>Percentage of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accelerating Early Pipeline and Lead Generation/Management Efforts</td>
<td>49%</td>
</tr>
<tr>
<td>Focusing Enablement Support (e.g., Tools, Technology, Training) to Support Virtual Selling or Buying</td>
<td>41%</td>
</tr>
<tr>
<td>Driving Effectiveness of Global and Key Account Programs</td>
<td>29%</td>
</tr>
<tr>
<td>Redesigning the Sales Organization (e.g., Redeploying or Shifting to Inside or Virtual Sales Roles)</td>
<td>28%</td>
</tr>
<tr>
<td>Improving Customer Retention and Loyalty</td>
<td>26%</td>
</tr>
<tr>
<td>Mapping or Updating Buying Journey to Capture Changes in Digital/Virtual Buying</td>
<td>22%</td>
</tr>
<tr>
<td>Improving Sales Analytics Capabilities (e.g., Deploying Analytics Platforms, Upskilling Team)</td>
<td>22%</td>
</tr>
<tr>
<td>Improving Alignment With Other Functions (e.g., Marketing) to Meet Customer Expectations</td>
<td>21%</td>
</tr>
<tr>
<td>Rethinking Customer Segments and Tiers</td>
<td>16%</td>
</tr>
<tr>
<td>Growing Indirect Channel Partner Program</td>
<td>15%</td>
</tr>
<tr>
<td>Cost-Efficiencies (e.g., Automation, Investing in High-Efficiency Channels Like Digital Commerce)</td>
<td>12%</td>
</tr>
<tr>
<td>Adjusting or Redesigning Seller Compensation Plans</td>
<td>9%</td>
</tr>
<tr>
<td>Cost-Cutting (e.g., Freezing External Spend, Reductions in Force, Cutting Training Programs)</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
</tr>
</tbody>
</table>

n = 68
Source: 2020 Gartner CSO Priorities Pulse Survey
sales organizations soon realized that existing customers couldn’t offset the anticipated revenue loss from new customers. However, the skewed demand profile across different markets, travel restrictions and overall uncertainty made hunting for new customers a particularly daunting proposition. To complicate matters further, new challenges and behavioral dynamics were emerging from the new, virtual way of operating. Consequently, sales needed an updated blueprint for new customer acquisition tuned to this new normal — one that would guide customer engagement and resource allocation decisions to address present and emerging challenges.

To address these challenges, we suggest a three-pronged approach. Organizations can use commercial messaging to improve relevance of outbound communication, redeploy sales resources to relatively higher demand centers and assess the financial terms offered by competitors to prepare sellers with effective counteroffers/counterpoints. CSOs expect revenue from new customers to diminish in favor of existing customers when compared to pre-COVID-19 estimates (see Figure 3). This is likely a reflection of the perceived difficulty in acquiring new customers in the current business climate. To offset this expected shrinking of new customer revenue, CSOs are looking to accelerate their pipeline-building efforts.

Sales organizations’ effort to enable virtual sales is intricately tied to acquiring new customers. The initiative is considered second most important by CSOs for sales success heading into 2021.

**Enhancing Virtual Selling Capabilities**

As field sellers pivoted to engaging customers virtually, most organizations’ limitations in their virtual-selling capabilities became quickly apparent. More than half the respondents to our CSO Priorities Pulse Survey reported not being fully prepared to deliver similar value through virtual sales as they did through in-person interactions (see Figure 4).

Most organizations were not fully prepared for what was an abrupt transition to virtual sales. From effectively using virtual platforms to understanding virtual meeting hygiene, traditional field sellers faced multiple challenges stemming from their abrupt transition to remote

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**Figure 3: CSOs’ Revenue Expectation From New and Existing Customers**

What were your expectations for where revenue growth would come from in calendar year 2020 in pre-COVID-19 times vs. since?

<table>
<thead>
<tr>
<th></th>
<th>Pre-COVID-19</th>
<th>Since COVID-19</th>
</tr>
</thead>
<tbody>
<tr>
<td>Existing Customers</td>
<td>66%</td>
<td>70%</td>
</tr>
<tr>
<td>New Customers</td>
<td>34%</td>
<td>30%</td>
</tr>
</tbody>
</table>

*n = 68

Source: 2020 Gartner CSO Priorities Pulse Survey

**Figure 4: Perceived Preparedness Among Sales Teams for Virtual Customer Engagement**

How prepared is your sales team to deliver the same level of value in virtual engagements as it did through in-person engagements before COVID-19?

- **Fully Prepared**: 43%
- **Partially Prepared**: 57%
- **Unprepared**: 0%

*n = 68

Source: 2020 Gartner CSO Priorities Pulse Survey
work. However, with the absence/restriction of in-person meetings and social distancing norms likely to persist for the near term, most CSOs recognize virtual engagements to be key for prospecting success. Coupled with an urgency to build a new pipeline, sales organizations have looked to address these seller challenges through a mix of approaches. These range from creating virtual meeting playbooks and FAQ documents to using training and coaching methods to instill the requisite skills. To complement efforts at upskilling existing field sellers to sell virtually, some organizations are also considering hiring digital natives to help with virtual sales.

To lend focus to seller virtualization efforts, we recommend focusing on two key pillars: sellers’ engagement with customers and sellers’ digital dexterity. Organizations can enable sellers’ virtual engagements by helping them to leverage social media to create and nurture relationships with prospects. Additionally, sellers should be coached to effectively design and execute virtual sales calls through proper call planning. To drive digital dexterity, relevant behaviors and mindsets should be modeled and communicated to sellers. Coupled with this, CSOs can rethink how they pilot technology, creating an environment that enables sellers to safely experiment with technologies and access support as needed.

While most CSOs are focused on the need to upskill field sellers to sell virtually, only 4% of respondents to our 2020 CSO Priorities Pulse Survey aim to enable buyers to execute all buying jobs digitally. This overreliance on reps as the primary sales channel is at odds with changing buyer behaviors. Buyers rely on both seller websites and reps, across different buying jobs. Furthermore, younger buyers have a marked preference for digital channels. Almost half of millennial respondents to our B2B Buying Survey, expressed a preference for a rep-free experience. Although these buying behaviors may have been amplified by the pandemic, their prevalence can be traced to pre-COVID-19 times. These are fundamental shifts in buyer behavior and are expected to have a lasting impact on sales performance.

**Conclusion**

In these challenging times, as CSOs assess how best to guide their organizations, they need to elevate their perspective from that of a leader of sellers to a leader of sales. In doing so, CSOs should transition from efforts aimed solely at improving the “buying from rep experience” to efforts aimed at improving the “buying experience” overall.

1. 2020 Gartner CSO Priorities Pulse Survey.
Sales kickoff events are part of a sales organization’s identity, but economic uncertainty is prompting CSOs to choose a virtual alternative for next year’s sales kickoff. A well-planned virtual kickoff will power results by inspiring success, sharing information and connecting sellers.

For most sales organizations, the sales kickoff event is a highlight of the annual calendar. It may be expensive to stage and have a mixed impact on team productivity, but it is both a great source of learning, strategic alignment with sales priorities and social energy. However, in light of ongoing economic uncertainty and health risks associated with large, live events during a pandemic, many sales leaders are opting for a fully virtual sales kickoff event in 2021.

CSOs who are planning a virtual sales kickoff in 2021 should ask their sales enablement teams these four questions to ensure a successful event:

1. **Inspire** — How will we increase sales team access to sales leaders, customers and subject matter experts (SMEs) to inspire success at the event?

2. **Inform** — What steps are we taking to ensure the event effectively educates sellers of the company’s most important 2021 initiatives and the actions that will make them successful?

3. **Connect** — How will we ensure participants fully engage and have time built-in to interact with sellers who they would not normally meet with at the event?

4. **Plan** — How will we ensure virtual technology enhances the event’s impact?
In the move to virtual, CSOs cannot let sales enablement leaders lose sight of the core components a successful sales kickoff achieves. As noted earlier, those components are to inspire success, inform sellers and connect sales teams (see Figure 1). CSOs should understand each component and use our guidance to ensure their enablement leaders effectively leverage technology, which underlies each of these components, to successfully execute a virtual sales kickoff.

1. Inspire: How Will We Provide Access to Sales Leaders, Customers and SMEs at the Event?

One of the main objectives of a sales kickoff is to inspire the sales team by providing opportunities to expose sellers to customers, leaders and other experts, celebrate the team’s success and apply insights from sessions to their account activities.

Share Expertise and Guidance

To replicate an in-person experience, CSOs should consider increasing the exposure to customers and sales leaders. Some companies’ most memorable kickoff sessions feature customers describing new ways they have gained a competitive advantage from implementing a certain solution. At one recent sales kickoff, a CSO asked a customer to share a story about how the company’s solution helped the customer recover data from data centers damaged by a recent hurricane. In a virtual kickoff, customers can easily get involved and share their stories, since travel is no longer necessary to participate. CSOs and their sales leadership team should include customers in both large- and small-session formats.

The same concept can be applied to sales leaders. A virtual sales kickoff helps them meet with more sellers in smaller group sessions, makes their inspirational impact more personal by reinforcing the message made in larger group sessions and specifies how various teams’ actions contribute to that impact.

Figure 1. The Core Components of a Successful Virtual Sales Kickoff

- **Inspire**
  - Increase exposure to leaders, customers and subject matter experts by using meeting technology.
  - Celebrate the organization’s culture with content and activities built for remote participants.
  - Distribute mission sheets to help sellers apply lessons.

- **Inform**
  - Plan pre- and postevent activities to account for reduced knowledge sharing at the event.
  - Modify content for virtual delivery.
  - Shorten presentations and sessions.
  - Adapt session times and localize content to better engage regions.

- **Connect**
  - Incorporate fun team-building activities.
  - Drive engagement with event chat.
  - Create shared-interest communication channels that last beyond the event.

Source: Gartner
Celebrate Organizational Culture

As the leader responsible for the culture of the sales organization, CSOs must ensure the event is consistent with and reinforces the values and behavioral norms they want individuals in the organization to operate under to get work done.

Put Inspiration Into Action

In addition to inspiring the teams during the kickoff, CSOs must turn inspiration into actions after the event to propel the team forward on the trajectory needed to start the new year. Virtual events make this task particularly challenging, as the entire team is not together in-person to discuss how they will apply what they hear to their accounts. Charging sales enablement with creating mission sheets is a good way to make progress here. A mission sheet is a tool for sellers to document how they will execute after the event and throughout the year to help the company succeed. The mission sheet lists the key take-aways from each day, which helps sellers tie their inspiration and learning back to their selling activities.

The mission sheet has two parts: a session-by-session list of the big take-aways and an area for sellers to document their specific missions for each session. Their missions are aligned with the messages and activities from the event. Sales managers should review and revise the mission sheets within a week of the sales kickoff’s conclusion and then monitor each seller’s progress against the mission sheets in their ongoing forecast review meetings (see Figure 2).

Figure 2. Sample Mission Sheet for Sales Kickoff

<table>
<thead>
<tr>
<th>Stated Goals From Key Sessions</th>
<th>Missions to Execute</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Goals From “Next Year’s Sales Plan” Session</strong></td>
<td>1.</td>
</tr>
<tr>
<td>• Achieve Revenue Target</td>
<td>2.</td>
</tr>
<tr>
<td>• Exceed Margin Target</td>
<td>3.</td>
</tr>
<tr>
<td>• Drive X% of Business Through Channel Partners</td>
<td></td>
</tr>
<tr>
<td><strong>Goals From Product Launch</strong></td>
<td></td>
</tr>
<tr>
<td>• Address the New Market</td>
<td>1.</td>
</tr>
<tr>
<td>• Drive $X Revenue by 3Q</td>
<td>2.</td>
</tr>
<tr>
<td>• ...</td>
<td>3.</td>
</tr>
<tr>
<td><strong>Goals From Hospitality Industry Roundtable</strong></td>
<td></td>
</tr>
<tr>
<td>• Tailor our go-to-market message for three new personas — restaurant manager, hotel manager, travel agent</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
<tr>
<td><strong>Goals From Customer Story Session</strong></td>
<td></td>
</tr>
<tr>
<td>• ...</td>
<td>1.</td>
</tr>
<tr>
<td>• ...</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
</tr>
</tbody>
</table>

Source: Gartner
2. Inform: How Will We Educate Sellers of the Company’s Most Important Initiatives?

CSOs should have their sales enablement leaders coach content creators to structure their sessions differently. This action ensures sellers understand and are engaged, despite the more compressed format required for virtual meetings.

Transition Agenda From Stage to Screens

Every event, including virtual events, will have a certain number of big stage (or “big screen”) presentations where an executive delivers important information and information flows one way. In some cases, sellers will need time to apply what they have learned and come together to review outcomes and course-correct. Introduce important ideas and initiatives during the event and then schedule follow-up sessions after the event to share updates on progress made on those initiatives.

Transition Content From Stage to Screens

Include polls, chats and brief activities to keep sellers engaged in the virtual event. Coach the presenters to be concise and have a simple, actionable message. Presentations that do not include interactions with the audience should be no more than 20 minutes long. As a general rule, virtual events should be short, comprising a few days (no more than a week) of half-day meetings and should have at least a 10-minute break every 60 to 90 minutes.

Reinforce Content for Improved Comprehension

To ensure the momentum generated at the virtual kickoff event is carried through the following months, CSOs and other sales leaders should take steps to ensure sellers understand the information shared and demonstrate what they have learned. Seller mission sheets are a good starting point. But sales enablement should also partner with sales leaders to design activities that frontline sales managers can lead their frontline sellers through. These activities allow sellers to practice new skills and knowledge in scenarios simulating actual customer situations.

For example, the manager would describe the objective of the exercise and prompt sellers to describe a relevant situation with a prospect. The manager plays the role of the prospect while the sales rep walks through the situation for five to 10 minutes. Consider recording the role-playing and use video coaching technology to provide feedback and identify seller development areas.

3. Connect: How Will We Ensure Participants Fully Engage and Have Time to Interact With Sellers?

Sales kickoff events are designed to foster team unity and connection, which often occurs naturally during face-to-face events. When sellers are brought together virtually, CSOs must ensure their sales leadership team thinks differently about strengthening the connections between the remote participants.

Orchestrate Fun

CSOs should encourage sales enablement leaders to consider these and similar team-building activity ideas to unify sales teams at a virtual sales kickoff:

- Coordinate virtual breakout rooms during lunch so participants can eat together.
- Invite special guest appearances from entertainers, such as dancers, yoga instructors or mixologists.
- Include competitions such as scavenger hunts, virtual karaoke (live or recorded) or trivia contests.
- Send packages to participants containing gifts normally provided at an in-person event.
Use Chat for Continued Engagement

Facilitating chat throughout the virtual event helps promote engagement. Examples of how to best use chat to drive virtual engagement include:

• Start the day with a couple of questions to initiate interactions through chat.
• Encourage presenters to ask for comments and questions to keep the agenda moving.
• Orchestrate questions from managers that exemplify appropriate questions to ask in the chat and make sellers more comfortable with this format.

4. Plan: How Will We Ensure Virtual Technology Enhances the Event’s Impact?

CSOs must also understand how technology underpins the success and impact of the event as a whole. To define the virtual event strategy and gain buy-in from key stakeholders, CSOs should task sales enablement leaders with establishing a charter early in the planning process. This charter document will help articulate and maintain the scope as planning progresses. The charter should include:

• Goals for the virtual event and key stakeholders (with their assigned areas of responsibility)
• Identified and potential challenges, and internal and external dependencies
• Technology considerations (and expected budget requirements)
• Development and delivery timeline
• Summary of virtual sales kickoff differences compared to previous live events

Once the charter is created, the next step is to identify the right technology to help achieve the event’s goals. The sales leadership team, including the CSO and sales enablement, should consider three factors to determine if they should leverage their company’s existing meeting solution for the virtual sales kickoff event:

• Audience size
• Event goals
• Number of small group or interactive sessions

CSOs must note that technology plays a much more significant role in a virtual kickoff than an in-person event and therefore, requires more deliberate preparation. To ensure the event runs smoothly — even in the event of a technology failure — sales enablement should develop contingency plans. Such plans include scheduling dry runs for each speaker to practice, recording and storing these dry-run session videos and using them if a presenter experiences technology issues during the event. To develop a list of requirements for a new meeting solution technology, the CSO and sales enablement must consider:

• The mix of live and prerecorded events
• How questions will be managed
• Whether audience polling will be necessary
• Whether sessions will be stitched together with music and video, or graphics

Conclusion

CSOs play a crucial role in ensuring the success of their upcoming virtual sales kickoff. By posing the four questions outlined to their teams, CSOs can ensure the best possible outcome for a virtual kick-off that will power results throughout 2021.
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The first half of 2020 has been an eventful one to say the least. CSOs are looking into the rest of 2020 and beyond to build a clear strategy to support the sales force in a virtual selling environment. This framework enables CSOs to align virtual selling with new buying realities.

While initially perceived as a short-term adjustment to the sales approach, the uncertain nature of the pandemic as well as the promise of future cost savings indicate virtual selling is likely here to stay.

In a June 2020 survey of CSOs, a remarkable 23% reported plans to permanently shift field sales to virtual sales roles, and another 36% said they were unsure about a permanent shift. Progressive sales leaders are preparing sales teams for, at the least, far greater virtual sales presence than was expected at the beginning of the pandemic. They realize they must guide sellers to stop assuming live meeting practices transfer 1:1 to virtual settings and prepare them for virtual-first selling behaviors required to succeed today. This preparation includes considerations such as improving platforms, rightsizing pitches and content, more thoughtful precall planning and increasing buyer enablement to support asynchronous customer decision making.

We provide a framework for CSOs to build the organizational capability for a virtual selling strategy in the following key areas:

- Virtual Customer Engagement — Changes to precall planning and preparation, and in-meeting practices to ensure a productive and engaging dialogue with customers during virtual sales interactions.
- Virtual Seller Enablement — Changes to training and onboarding sellers in a virtual sales environment that equip them to effectively sell in a remote setting.

**Virtual Customer Engagement**

While most CSOs recognize the importance of precall planning to ensure the limited time with customers provides the highest returns, the current environment is presenting new challenges. Specifically, compared to live meetings, virtual settings require more active coordination between sales call participants and preparation to determine the choreography of calls.
Furthermore, compared to live meetings, in a virtual setting:

- Customers are likely to have lower attention spans.
- Customers’ expressions, body language and other cues are harder to observe and track.
- Key decision makers and senior leaders may delegate virtual calls to junior contacts.
- Stakeholders may be more reluctant to share skepticism and challenge viewpoints, especially in a big buying group, making it harder to facilitate consensus.

Therefore, CSOs must lead their sales teams through changes in their customer engagement strategies, including the preparation for sales calls as well as interactions over video and teleconference platforms. Table 1 lists the most significant activities that CSOs need to rethink in a virtual setting to ensure seller success.

## Virtual Seller Enablement

As a majority of the sales force continues to work remotely, sales organizations will consider making remote selling a long-term strategic play.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Current Approach</th>
<th>Optimal Virtual Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Stakeholder Identification and Engagement</td>
<td>• Assume stakeholders who previously joined live interactions will or should be the same stakeholders present for virtual interactions.</td>
<td>• Confirm participation by senior stakeholders who may delegate virtual sales calls to junior contacts. • Ensure sellers prepare talking points and a plan of action to (a) invite inputs from stakeholders other than the primary contact, and (b) proactively seek information about additional stakeholders who should be involved.</td>
</tr>
<tr>
<td>Agenda and Role Clarity</td>
<td>• Communicate an expansive agenda and create loosely defined roles for customer interactions.</td>
<td>• Guide salespeople to prepare a narrowly scoped agenda and tightly defined roles for supplier participants while selectively including remote, high-quality experts for complex deals.</td>
</tr>
<tr>
<td>Action Items and Next Steps</td>
<td>• Conclude with an understanding of issues and a scheduled follow-up meeting to discuss action items and next steps.</td>
<td>• Include “leave behind” buyer enablement that can help customer stakeholders socialize ideas and drive action asynchronously. • Emphasize the need to ensure agreement and clear expectations on next steps.</td>
</tr>
<tr>
<td>Content and Interactivity</td>
<td>• Use live meeting tactics to deliver the bulk of information in the virtual sales meeting. • Use standard “live meeting” slides that require attention and time to properly explain.</td>
<td>• Ensure sellers are consistently delivering shorter and bite-sized content, while also prioritizing critical information required to educate customers and provide buying help. • Encourage tools and tactics that invite customer collaboration, such as polling questions and whiteboarding, to co-create ideas.</td>
</tr>
<tr>
<td>Consensus Facilitation</td>
<td>• Rely on live meeting tactic of “reading the room” to help pull in skeptical opinions and engage passive stakeholders. • Follow up 1:1 with individual stakeholders to resolve conflicting viewpoints.</td>
<td>• Leverage Mobilizers to help prepare other stakeholders before the meeting and partner with them during the meeting to encourage buying group participation. • Debrief with Mobilizer to assess stakeholder engagement and create a plan to facilitate consensus.</td>
</tr>
</tbody>
</table>

Source: Gartner
Therefore, CSOs must adapt seller enablement for the virtual environment.

Table 2 highlights how CSOs can optimize their approach to virtual seller enablement in areas such as sales training, onboarding, events and enablement technology.

### Next Steps and Way Forward

For successful virtual selling today, CSOs must adjust their existing investments and reallocate resources among people, processes and technology. Furthermore, a more permanent shift to virtual selling will compel sales organizations to adjust sales strategy, internal organizational design, go-to-market strategies and key performance metrics. CSOs must lead the sales organization through these changes and prepare their teams to adopt new ways of enabling frontline sellers and buyers.

### Table 2: Virtual Seller Enablement

<table>
<thead>
<tr>
<th>Activity</th>
<th>Current Approach</th>
<th>Optimal Virtual Approach</th>
</tr>
</thead>
<tbody>
<tr>
<td>Training and Onboarding Design</td>
<td>• Convert existing classroom training curriculum into e-learning without selecting and prioritizing best-fit content for different channels of delivery.</td>
<td>• Work with the enablement team to design and deliver training either synchronously (including a live facilitator) or asynchronously (e-learning) based on type of content, seller skill maturity level, need for collaboration and in-the-moment advice.</td>
</tr>
<tr>
<td>Skills Taught in Training</td>
<td>• Refresh the front line on skills already taught in training and rely on managers and sellers to contextualize learning for the current environment.</td>
<td>• Emphasize skills important for virtual interactions, such as discovery, active listening, social selling, stakeholder management, commercial insight delivery, consensus facilitation and negotiation. • Direct focus on new or emerging skills, such as sensemaking, digital dexterity and data literacy, that reflect remote selling realities.</td>
</tr>
<tr>
<td>Sales Enablement Technology</td>
<td>• Introduce new digital tools and technologies to help sellers collaborate internally and engage with customers virtually.</td>
<td>• Carefully assess existing technologies and digital tools to understand additional functionalities they are able to offer before introducing new tools and technologies or retiring old ones. • Set up training sessions for managers and sellers on how to best use existing technologies, such as Google GSuite, Cisco Webex and other tools to collaborate and share content, internally and with customers. • Deploy AI-based conversational analytics and guided selling capabilities to help manage the full pipeline, from lead development to helping sellers capture buying signals and sentiments that are lost using traditional selling methods.</td>
</tr>
</tbody>
</table>

Source: Gartner
Which Sales Force Sizing Method Is Right for You?

In a time of market disruption, CSOs must redeploy their resources to match changed demand. CSOs should ensure their direct reports adopt suitable methods to rightsize the sales force.

Source: Gartner

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Review: Gartner’s Sales Force Sizing Method Selection Framework

![Diagram](https://via.placeholder.com/150)

1. **Workload Method** (Buildup)
   - **Approach**: Total sales workload is divided by average selling time per seller.
   - **Improvements**:
     - Account tiering
     - Workload distribution (Monte Carlo Simulation)

2. **Pipeline Workload Method** (Buildup)
   - **Approach**: Total sales workload per sales pipeline stage is divided by average selling time per seller and aggregated across sales stages.
   - **Improvements**:
     - Multiyear model
     - Progression probability-based account tiering

3. **ROI Method** (Profit Optimization)
   - **Approach**: Sales cost is adjusted to achieve favorable trade-off between estimated revenue and selling costs.
   - **Improvements**:
     - Seller segmentation by role
     - Account segmentation and tiering

4. **Sales Response Method** (Profit Optimization)
   - **Approach**: Revenues target is divided by average sales per seller.
   - **Improvements**:
     - Seller segmentation
     - Account segmentation and tiering

5. **Demand-Market-Based Method/ Revenue per Rep Model** (Breakdown)
   - **Approach**: Revenue target is divided by average sales per seller.
   - **Improvements**:
     - Seller segmentation
     - Account segmentation and tiering

Take Action: Use Gartner’s Decision Framework Below to Identify the Sales Force Sizing Methods Suitable for Your Organization, by Answering the Following Questions

a) How would you describe your sales process complexity?

- High
- Low

b) How would you describe your operational capability for sales force sizing?

- High
- Low

![Diagram](https://via.placeholder.com/150)

Stay With Chosen Method

Start With Chosen Method

Start With Chosen Method

Start With Chosen Method

ROI Method

Sales Response Method

Sales Operational Capability

Sales Process Complexity

Is sales force sizing done manually, using thumb rules and without dedicated personnel?

Is sales force sizing done manually with limited data by analysts with intermediate skills?

Is sales force sizing done using packaged software solutions, a mix of internal and external data sources, and experienced data analysts?

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Connecting Innovation and Sales for the Future With JLL’s Steve Ramseur

By Antra Sharma

CSOs can learn how one of their peers — JLL’s Steve Ramseur — is taking steps to prepare his sales organization for the postpandemic period by strategically aligning technology and innovation to work toward creating an exceptional customer experience.

Steve Ramseur

Steve Ramseur serves as chief innovation officer at JLL, where he is responsible for putting the firm’s leading edge innovation in the hands of its sales teams. Previous to this role, Steve led a team to increase productivity for professionals in JLL’s largest service line. Steve has been building businesses and technology applications within global enterprises, for the past 25 years, with a continued passion for sales.
I am a serial intrapreneur and have been working with teams to build businesses for large corporations. The Staubach Company, a real estate services firm specializing in tenant representation, hired me in 2007 as EVP in the corporate solutions space, less than a year before its merger with JLL. We spent the next six years building the integrated portfolio services business, before I was named its president, where I also oversaw our tenant representation and project management services. In February of 2020, I was offered the position of chief innovation officer.

There are two significant lessons that have led me to this position and contributed to my success in my most recent role as the head of sales for the firm’s largest service line. First, is a willingness to make smart mistakes and second is recognizing the nexus between sales and innovation. For me, sales and innovation share a symbiotic relationship, moving in close association together, and for me, that is key.

“Thanks for joining us for this conversation. You have over two decades of experience in sales. Can you share your journey so far and your path to becoming a chief innovation officer at JLL?”

Can you tell us more about what you mean by the nexus between sales and innovation and how you capitalize on this relationship?

Wayne Gretzky was a great hockey player because he didn’t skate to where the puck was, but to where the puck would be. Like Wayne, we focus on the future. Where many organizations go wrong is when they build products and services for where customers are today, instead of solving future problems. When you build products for today, then by the time you deliver the product, it is potentially “yesterday’s news.” When my customer has a job to do today, my role as an innovator is to project the future and skate to where that job will be, years from now.

To do that, we first build a future view around the trends that will shape our world 10 years from now. Based on those scenarios, we ask the question, “What is the job that the customer wants done or what problem will they need to solve?” Then, we begin to innovate with the compass pointed toward the true north of the future. Staying focused on the job to be done for the customer and wrapping our innovation around its future, we can stay ahead of the marketplace. This is a future-back, not a today-forward strategy.

As innovators and sales leaders, we have to be comfortably uncomfortable. We can be strategically successful today, but we cannot be complacent. I believe there’s a Moore’s law for sales. Moore’s law states that computing power doubles every two years, though the cost is halved. I think the same thing is happening with our sales force right now. If we are not leading with innovation in how we sell, then by definition, we are lagging. This is why we have brought technology and innovation to the point of sale.

“As innovators and sales leaders, we have to be comfortably uncomfortable. We can be strategically successful today, but we cannot be complacent.”

You make it sound simple to build a future view and work back from that. However, everything seems so uncertain today; how do you gain clarity about what the future will look like when very few could have predicted the last 12 months?

My favorite philosopher, Yogi Berra, said, “It is difficult to make predictions, especially about the future.” However, there are strategic techniques to identify trends. We have more clarity about the next 10 years than the next 100 days. The key is to study and extrapolate from the trends.

For example, consider a simple demographic trend. According to Pew Research, millennials overtook baby boomers as America’s largest generation in July 2019. Given the shift in the workforce, other trends such as advances in machine learning and artificial intelligence, high-speed data analytics, advanced visualization of information and the proliferation of the Internet of Things, make for a number of interesting potential scenarios. Envisioning the future 10 years from now, these trends help you determine that there will be fewer baby
boomers, more digital natives and a higher percentage of the population working in the gig economy. Once we understand how these trends will impact customers and the problems they will face, we can then triangulate around the same trends to make strategic bets on where customers are headed.

**Can you give us an example of how your focus on the future helped you as a sales leader at JLL?**

Roughly four years ago, we looked at our leasing process and tried to redesign it based on how we imagined the future. We began by mapping out details, such as key stakeholders, data sources and outputs. Then, we simplified these into a flow chart. Our legacy leasing process would have typically taken four to 12 months for a customer to go through, but now it can be completed in a couple of virtual meetings. We launched this application three weeks before COVID-19. This is an example of how we have taken an antiquated business process and rather than simply digitizing it, thought through a true digital-first buying experience (initial data indicates success with increased win rates).

**Obviously, coping with the business disruptions due to COVID-19 has been a huge challenge for sales leaders this year. We can imagine that’s doubly true for leasing commercial real estate in a work-from-home business environment. What are some of the most significant and long-term ways that it has impacted your organization?**

We have felt the impact in every conceivable way. Most acutely, the pandemic has brought about a significant increase in the space required for each worker. Naturally, that has massive cost implications for corporate real estate. But even more broadly, it has raised the question of the future of commercial office space. Now, the future focus is not so much on whether organizations need corporate real estate, but how can corporate real estate help organizations improve productivity, engagement, empowerment and fulfillment, thus improving culture. How can the new workplace support these aspects and attributes? These are all massive shifts impacting the sales force and it is up to us to shape them.

As customer interactions are now taking place via the internet, with multiple stakeholders in the same meeting, sellers need to reskill for
greater empathy in customer conversations. Body language is a significant means of communication and we need to learn how to read that in the “new normal.”

At the same time, it is our view that people also need in-person interaction and therefore, we are bullish on the future of the office. We believe this future will require a return to the office because that is the only place where you can create unscheduled collisions with colleagues that foster collaboration.

“Body language is a significant means of communication and we need to learn how to read that in the ‘new normal.’”

How are you leading your organization to deal with these challenges?

There are three major initiatives we’ve worked on with our sales force.

The first is our transition to virtual selling, and we have been able to make this shift because of a bet and an investment we made four years ago. Roughly three weeks before the world shifted to a WFA [work from anywhere] situation due to COVID-19, we moved our sales process to a virtual format. Our focus on the future allowed us to act when the time was right and swiftly adapt to this environment. We were pretty lucky that we started preparing when we did.

The second initiative is around how we can help our customers through this period. We are leading an organizational shift in the emphasis from success to significance, where significance refers to individuals’ personal well-being, health, and their community’s and family’s health. Our motto at JLL is leading with humanity and humility. To achieve this, we set up peer forums all over the world, where different customers can come together and connect with others who have similar issues and share the best practices on how to overcome those hardships. This started as something to help sellers learn about their customers’ needs, but has become a great way to help our customers also cope in this difficult time, and that is more important than leasing a commercial space right now.

The third initiative was training. Our salespeople had extra time in the early stages of the pandemic as business slowed down. We used this time and invested to provide them with high-quality training that was focused on developing stronger and more customer-centric skills in the virtual environment. The idea is to equip the sellers with skills that will carry over as essential in the postpandemic period.

“While in-person interactions will continue to be more effective to spark innovation and foster collaboration, the future office will allow people to meet and produce products in a virtual space as well.”

As your peers look to close 2020 strong and set a clear strategy for 2021, what are the longer-term trends you’d suggest they focus on in their planning?

Let us look at the trends to settle the mystique around the question of the future of the workplace. We see the notion that the workforce could not be productive under a WFA setup is not true. Most individuals are either equally or even more productive working from anywhere. As offshoots of this trend, there are developing and emerging technologies that will make virtual interaction increasingly similar to the in-person experience. It would be safe to say that the intersection between the physical and the digital world will continue to converge. While in-person interactions will continue to be more effective to spark innovation and foster collaboration, the future office will allow individuals to meet and produce products in a virtual space as well.

Another significant trend is in the way we sell. Selling is more about creating an experience for the client now. The future salesperson will be an educator, teaching customers to navigate all options. There will be an increased requirement for acute soft skills like empathy, active listening and the ability to guide clients through their own buying journey.

Ultimately, we need to remember that prospects buy the future. We have to build a story about the future and draw customers as the protagonists in that story. The key is to begin with the customer by identifying their problems, their future needs and then skate to where the two intersect. As long as we are focused on that intersection, we can keep moving forward.
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