2021 Strategic Roadmap for Sales Analytics

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Initiatives: Sales Strategy and Operations; CRM Sales Technology

Sales analytics functions often struggle to deliver desired commercial impact due to perennial challenges with low data quality and poor stakeholder engagement. To achieve their full potential, sales operations leaders must prioritize data governance, data literacy and advanced analytics technology.

Overview

Key Findings

- The need for collaboration among commercial functions is growing as buyer preferences evolve. From an analytics perspective, seller-provided CRM data may no longer provide sufficient intelligence on buyer behavior and intent. Sales analytics functions that don't fully understand the information needs of the larger organization are missing the opportunity to share insights among commercial functions to drive more cohesive decision making.

- Over half of surveyed organizations attribute poor sales data quality to inaccurate and incomplete data. Unfortunately, almost half of organizations have not established a formalized data governance body. A lack of data governance makes it difficult for sales operations to improve data quality and build trust in their analytical insights.

- The technology delivering sales analytics most commonly consists of reports and dashboards residing in native sales systems. Expectations for unlocking analytical insights through more advanced technology, particularly by improving data integration and deploying AI, are on the rise. Sales operations leaders are challenged to identify the technologies most appropriate for their organizations.

Recommendations

Sales operations leaders responsible for improving sales analytics must:

- Ensure executive support for transforming the sales analytics function by designing a clear and compelling vision for sales analytics that reflects the needs of all commercial functions.

- Establish a formal data governance program to monitor and promote data quality, oversee analytics projects and enable high-quality collaboration among all sales analytics stakeholders.
Initiate a cross-functional data literacy program to ensure consumers of sales analytics derive meaningful value and consistent interpretation.

Develop a multiyear roadmap for sales analytics technology by identifying and prioritizing specific use cases where advanced technologies offer the highest potential commercial impact.

Analysis

Sales operations leaders responsible for sales analytics are faced with a widening gap between their stakeholders’ need for data-based insight and today’s status quo of data and analytics. A number of factors are contributing to this growing challenge.

- Suppliers are facing unprecedented disruption and are looking to analytics to help them make sense of changing buyer behavior.
- Buyers are increasingly opting to interact with suppliers through digital channels, making it harder for sales analytics functions that rely on seller-provided pipeline data to glean insights.
- Sales operations leaders cite the complexity of business and its underlying data as a top obstacle for sales analytics, which will be exacerbated as new systems and data sources are added to the technology stack.
- Suppliers intend to invest in AI to take advantage of more predictive and prescriptive analytics, but are unsure where (i.e., with which use cases) to begin that journey.

Sales operations leaders can use our 2021 Strategic Roadmap for Sales Analytics to assist with this transition and set their vision for bridging the gaps between their current and future states (see Figure 1). This roadmap is accompanied by a toolkit that enables these leaders to develop a tailored plan based on their specific starting points and their organizations’ own goals.
Figure 1. Strategic Roadmap Overview for Sales Analytics

### Strategic Roadmap Overview for Sales Analytics

<table>
<thead>
<tr>
<th>Future State</th>
<th>Current State</th>
<th>Gap</th>
<th>Migration Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Augmented analytics and the decline of the dashboard</td>
<td>Sales analytics primarily targeted to the sales function</td>
<td>Limited participation in analytics selection and design</td>
<td>Align stakeholders on a vision and prioritization of use cases.</td>
</tr>
<tr>
<td>A host of new data inputs unlocked by X analytics</td>
<td>A common challenge posed by data governance</td>
<td>Analytics adoption inhibited by low data quality and trust</td>
<td>Establish data governance to enable collaboration.</td>
</tr>
<tr>
<td>(technology that can detect, evaluate, extract and organize data from written</td>
<td>Prevalence of native sales system reporting</td>
<td>Incomplete integration of channel interaction data</td>
<td>Elevate levels of data literacy throughout the organization.</td>
</tr>
<tr>
<td>text, spoken words and video recordings)</td>
<td>Data literacy lowest at the seller level</td>
<td>Gaps in data literacy limit ROI on sales analytics</td>
<td>Prioritize technologies for specific sales use cases based on potential business impact.</td>
</tr>
<tr>
<td>A seamless buying experience enabled by continuous intelligence</td>
<td></td>
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<tr>
<td>Democratization of data science and AI</td>
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<tr>
<td>Personalization displacing one-size-fits-all analytics</td>
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**Future State**

### Augmented Analytics and the Decline of the Dashboard

A group of intelligent application capabilities, collectively known as “augmented analytics,” has emerged at the meeting point of three important sales force automation (SFA) software trends. These trends — data management automation, predictive sales analytics and natural language AI — are enabling SFA systems themselves to perform many of the error-prone, inefficient tasks that have stood between raw data and universal access to sales insights. Augmented analytics automates data preparation, intelligently structures and tags that information for further analysis, and, using machine learning, discovers and delivers insights directly to sellers and managers — on demand, just in time or even before those users have thought to ask a question.

As the burden of framing and answering questions shifts from salespeople to augmented analytics, the role of the traditional sales dashboard will change. In some sales organizations, the need for dashboards will disappear altogether. For many others, sellers and managers will continue to use dashboards, but less often and under a narrower set of scenarios.
Figure 2 illustrates changes to the sales analytics workflow that will result from the availability of augmented analytics.

**Figure 2. How Augmented Analytics Changes the Sales Analytics Workflow**

Sellers and sales managers will not be the only beneficiaries of new augmented analytics. Shifting important but difficult tasks to the automated intelligence of the SFA platform will eventually reduce the demand for true data scientists dedicated only to sales analytics. Increasing audience data literacy remains important for reaching sales analytics maturity. But the delivery of augmented analytics will soften the effects of end-user data literacy gaps and lighten the burden on sales analytics by automating analytics data preparation steps, facilitating machine learning model selection and autogenerating insights.

**X Analytics Unlocks a Host of New Data Inputs**

We coined the term “X analytics” for an emerging class of intelligent technology that can capture much of the unstructured business process information that has resisted measurement in the past. (The X is
shorthand for the many data input types this model can accommodate, such as “text analytics,” “video analytics,” or “audio analytics”). Examples of X analytics in sales can already be seen in conversational engagement analytics solutions, such as those recording and parsing audio and video communication streams to provide deal insights, competitive intelligence and pricing recommendations. Furthermore, SFA vendors are also embedding phone call conversation data to provide input on sales coaching.

X analytics is a still-maturing technology, but vendors already offer sales analytics applications that can detect, evaluate, extract and organize data from written text, spoken words and video recordings. Some X analytics packages can even judge certain emotional qualities of a seller-customer interaction.

To take hold, of course, X analytics will depend on sales operations to implement deep, learning-based video and image analysis techniques and products. The types of inputs that lend themselves to this technology will soon extend beyond the initial successes already seen in the areas of image, video and audio to include new sources, such as Internet of Things data. For example, sensor data from manufacturing equipment may show a component is operating inefficiently, indicating an opportunity for the supplier to upsell the customer a more modern and cost-efficient unit.

Continuous Intelligence Enables a Seamless Buyer Experience

Continuous intelligence (CI) is the real-time integration of analytical decision support directly into audiences’ day-to-day business activities. CI draws on multiple technologies, including augmented analytics, X analytics, event stream processing, optimization modeling and business rule management. Live tracking signals extracted from sales activity data (such as email, natural language processing of phone call content, calendar invitation metadata and even handwritten meeting notes) are combined with current and historical data to derive decision-support insights. These are pushed to users just when they need them, as shown in Figure 3.
How CI Enables a Seamless Buyer Experience

Turnkey CI offerings are already commercially available for a growing list of sales analytics use cases, including lead and opportunity scoring, conversational engagement analytics, and predictive forecasting. However, sales operations leaders must recognize the ecosystem needed for a functional CI model requires a multiyear approach to building out the foundational listening mechanisms, analytics engines and decision algorithms that power a CI capability.

The ultimate benefit of CI is the ability to interpret buyer interactions occurring via a variety of digital and nondigital channels, providing a clearer view of the purchase decision process. Armed with this information, the supplier can determine appropriate next steps — again delivered digitally or nondigitally — to propel buyers forward in their journey.

Democratization of Data Science and AI

In the near term, the sales analytics team needs specialists in data science to envision, develop and harness the potential of augmented analytics, CI and similar innovations linked to AI. Very quickly, however, much of the specialized skills these experts provide will be replaced by automated analytics ecosystems that vendors are developing today. Combined with advances in human interface capability, the native intelligence within technology itself will make sales analytics audiences more autonomous on a day-to-day basis. Frontline and commercial leadership will enjoy seamless access to the insights they need to succeed. Meanwhile, the pressure on data experts to help deliver ad hoc support for stakeholders’ day-to-day challenges will ease (as will the risk of bottlenecks).
As barriers to end-user access recede, a democratizing wave of audience empowerment will ripple outward from the sales analytics program. Consumers of sales analytics, inside the sales organization and beyond, will depend less on sales analytics experts to understand, model and answer many ad hoc questions.

The need for data scientists will not disappear but rather evolve toward a higher-ROI delivery model. As technology empowers end users, the limited capacity of sales analytics experts can be deployed only to the most complex and unstructured sales problems. More guidance on how sales analytics talent requirements will change is offered in Transform Sales Operations for the Future.

These democratizing trends, like any changes, will also bring new challenges for sales leaders. Broad access to sales analytics insights can lead to data misapplication without well-designed guardrails and control points.

The importance of close coordination between sales analytics and enterprise technologists (corporate IT and business intelligence leaders) will grow even more important as these trends take hold. Corporate IT will have a similar mandate to deliver on the promise of AI. The walls of siloed business functions must be lowered, and governance will be best managed in an enterprisewide AI center of excellence. Here, highly specialized talent from IT will collaborate with business domain experts from all functions, including sales. Democratized AI solutions will require coordination with other business functions as well.

**Personalization Displaces One-Size-Fits-All Analytics**

The expansion of AI technology will bring the differences in the analytic needs of different audiences into sharper focus. For strategic, centrally focused users of sales analytics (CSOs, C-suite peers and EVPs of major divisions, for example), AI will enhance decision making by flagging patterns and forecasting broad outcomes better than humans can do.

Technology advances will make district and region leaders better strategists and coaches by synthesizing customer needs at the district, territory, account and opportunity levels simultaneously. Manager-facing analytics is an especially attractive use case for AI because of the advantages that an expanded dataset provides over the limited line of sight today.

For sellers themselves, augmented analytics functionality will improve short- and long-term decision making. Except for the most standardized, transactional settings (e.g., a high-volume call center), the value sellers receive will come in the form of data-led decision support at the portfolio, account and opportunity level. Less common in the B2B space will be the specific, real-time direction that many sales leaders associate with AI-enabled selling. Intelligent decision support will help sellers make the most of their human judgment (and it will quickly weed out sellers who lack those capabilities).

Customizing dashboard screens for different selling roles increases their value, but also their cost to develop and maintain. In the future, this trade-off will become less important because customization to
the role level will no longer be the gold standard for meeting audiences' unique analytics needs. AI technology will learn to deliver sales analytics tailored to specific sellers, customers and products. As these just-in-time sales analytics become common, the traditional one-size-fits-all approach — customizing dashboards to roles — will become less ubiquitous. In its place, a chance to create new analytics insights, enhanced by a narrower focus on specific audiences and use cases, will arise.

Current State

Sales Analytics Primarily Targeted to the Sales Function

Sales operations leaders are clearly focused on delivering analytics insight to the sales organization as opposed to the remainder of the commercial organization. In mid-2020, we surveyed sales and sales operations leaders to assess the usage and benefits of sales analytics among B2B suppliers. When asked to rank activities in terms of how important they are to sales analytics’ ability to deliver value to the organization, respondents saw “providing the information and analysis sales leaders need to make a decision” as most important. Conversely, “collaborating with stakeholders outside of sales” received the lowest importance ratings.¹

Not surprisingly, Figure 4 shows sales analytics are not universally adopted by key functions outside of sales. The marketing function consumes sales analytics in 84% of participating organizations. That proportion drops to 70% for both service functions and enterprise analytics functions.¹
We see this as a challenge for sales operations leaders responsible for sales analytics, as the need for cross-functional collaboration on data and analytics becomes essential to commercial success. We find trends toward multiexperience selling, as B2B buyers show a growing preference to engage with suppliers through digital and self-service channels (see The Future of Sales in 2025: A Gartner Trend Insight Report). As a result of this shift, it will become critically important for commercial functions within the supplier’s organization to collaborate on go-to-market activities. Sales operations leaders will be responsible for delivering insight using a shared set of data and analytics for aligned decision making.

Sales operations, with direct visibility into so many other functions, is uniquely positioned to consolidate and interpret the multifunctional analyses now possible as the number of data sources and volumes of data increase.

Data Governance Poses a Common Challenge
The importance of data governance for sustainable success is widely recognized, but our research indicates barely half (51%) of surveyed organizations have established a formalized data governance body. Another 32% have only an informal or ad hoc data governance team. The remaining organizations do not currently have a data governance team in place. ¹

Not surprisingly, issues stemming from inconsistent data capture are common, as shown in Figure 5. When asked what the most significant data quality challenges to sales analytics improving commercial performance are, 53% identified “inaccurate data stemming from user inputs” in their top three, higher than any other challenge. ¹

**Figure 5. Most Significant Data Quality Challenges to Improving Commercial Performance**

<table>
<thead>
<tr>
<th>Most Significant Data Quality Challenges</th>
<th>Top-Ranked</th>
<th>Second-Ranked</th>
<th>Third-Ranked</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inaccurate Data Stemming From User Inputs</td>
<td>13%</td>
<td>18%</td>
<td>21%</td>
<td>53%</td>
</tr>
<tr>
<td>Incomplete Data</td>
<td>19%</td>
<td>18%</td>
<td>14%</td>
<td>52%</td>
</tr>
<tr>
<td>Inconsistent or Incomplete Integration Across Systems and Platforms</td>
<td>14%</td>
<td>16%</td>
<td>17%</td>
<td>47%</td>
</tr>
<tr>
<td>Large Data Volumes and Latency of Updates</td>
<td>17%</td>
<td>12%</td>
<td>12%</td>
<td>41%</td>
</tr>
<tr>
<td>Duplication of Data</td>
<td>11%</td>
<td>14%</td>
<td>12%</td>
<td>37%</td>
</tr>
<tr>
<td>Data Compliance Regulations</td>
<td>16%</td>
<td>9%</td>
<td>12%</td>
<td>37%</td>
</tr>
<tr>
<td>Data Accessibility Limited by Security Rules</td>
<td>10%</td>
<td>12%</td>
<td>11%</td>
<td>33%</td>
</tr>
</tbody>
</table>

n = 299 heads of sales, sales operations and sales analytics
Q: Please select the three most significant data quality challenges to sales analytics improving commercial performance.
Source: 2020 Gartner State of Sales Operations and Analytics Survey 735547_C

This challenge is exacerbated by lower cross-functional participation in data governance activities. Sales is represented on 93% of data governance teams, but the number drops to 69% for marketing participation, and customer service is included on only 33% of governance teams. ¹
Sales operations leaders recognize improving data quality is the first step to building credibility and increasing the adoption of analytics within the commercial organization. But existing governance approaches are limiting the value organizations receive from advanced analytics tools, particularly due to a lack of trust in the data. As a result, we predict 90% of B2B enterprise sales organizations will continue to rely on intuition to guide much of their decision making. This presents a competitive advantage for the organizations who can improve their data governance to build credibility and expand adoption of analytics across commercial functions.

**Native Sales System Reporting Prevails**

Unsurprisingly, a large number of organizations rely on native CRM/SFA reporting as their primary solution for delivering analytics to sellers and managers. A combination of factors drive the popularity of native sales system reporting:

- The data entities and attributes involved are already familiar to users of the CRM/SFA system.
- No latency exists between source data and reports. A simple dashboard refresh provides up-to-date information on demand.
- This delivery channel does not add yet another application for the sellers and managers to access.
- The organization avoids the incremental cost of advanced analytics technologies.

Our recent data confirms this and reveals sales organizations’ latest preferences for delivering analytics. The current state of sales analytics technology largely consists of reports and dashboards residing in native sales systems, supplemented by information portals managed by IT. But the gap between the two is still significant; while 68% of sales organizations are using native sales system reporting for common sales KPIs, just 39% are using a business intelligence platform integrated with one or more heterogeneous systems.

The majority of analytics delivered via native sales systems offer descriptive and diagnostic insight, while predictive and prescriptive analytics are less common. The status quo is under pressure, however. Many clients express the need to evolve their sales analytics to incorporate previously overlooked leading indicators so they can deliver better predictive and prescriptive analytics. These organizations are looking to improve the maturity of their sales analytics through better governance, better technology and better data literacy among their stakeholders.

**Data Literacy Lowest at the Seller Level**

Today’s sales analytics functions are primarily focused on delivering on requests for reports and dashboards, but they neglect the need to improve the data proficiency and self-sufficiency of those making the requests. Sales and sales operations leaders indicate room for improvement in data literacy — the ability to “speak data” — exists across functions and teams in the commercial organization. More information on data literacy can be found at [Boost Data Literacy to Improve Value of Sales Analytics](#).
We define data literacy as the ability to read, write and communicate data “in context,” including an understanding of the data sources and constructs, analytical methods, and techniques applied, and the ability to describe the use-case application and resulting value.

When sales and sales operations leaders were asked to assess data literacy within their organization, differences in key roles were clear. Overall, 58% of respondents rate the level of data proficiency (i.e., understanding what information is available and how it can be used to solve business problems) in their organization as high. ¹

But a disparity in data literacy exists between key groups. Sales executives, sales operations and enterprise analytics teams are perceived to possess the highest data proficiency, but roles closest to customers showed the lowest ratings within sales. In particular, 43% of respondents rated direct sellers as having high data proficiency, significantly lower than the overall organization, as shown in Figure 6. ¹

**Figure 6. Direct and Overlay Sellers’ Rankings for Data Proficiency**

**Direct and Overlay Sellers’ Rankings for Data Proficiency**
Percentage Rating a Stakeholder Highly Proficient

<table>
<thead>
<tr>
<th>Sales Stakeholder/Function</th>
<th>Highly Proficient</th>
<th>Moderately Proficient</th>
<th>Slightly Proficient</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Analytics</td>
<td>60%</td>
<td>38%</td>
<td>2%</td>
</tr>
<tr>
<td>IT</td>
<td>56%</td>
<td>41%</td>
<td>3%</td>
</tr>
<tr>
<td>Sales Operations</td>
<td>54%</td>
<td>45%</td>
<td>0%</td>
</tr>
<tr>
<td>Finance</td>
<td>53%</td>
<td>43%</td>
<td>3%</td>
</tr>
<tr>
<td>Executive Sales Leadership</td>
<td>53%</td>
<td>45%</td>
<td>2%</td>
</tr>
<tr>
<td>Sales Enablement</td>
<td>51%</td>
<td>48%</td>
<td>1%</td>
</tr>
<tr>
<td>Marketing</td>
<td>49%</td>
<td>47%</td>
<td>4%</td>
</tr>
<tr>
<td>Service</td>
<td>49%</td>
<td>48%</td>
<td>3%</td>
</tr>
<tr>
<td>Product</td>
<td>48%</td>
<td>49%</td>
<td>3%</td>
</tr>
<tr>
<td>Second-Line Sales Management</td>
<td>47%</td>
<td>51%</td>
<td>1%</td>
</tr>
<tr>
<td>Frontline Sales Management</td>
<td>46%</td>
<td>53%</td>
<td>1%</td>
</tr>
<tr>
<td>Human Resources (HR)</td>
<td>44%</td>
<td>47%</td>
<td>9%</td>
</tr>
<tr>
<td>Direct Sellers</td>
<td>43%</td>
<td>54%</td>
<td>3%</td>
</tr>
<tr>
<td>Overlay Sellers</td>
<td>41%</td>
<td>56%</td>
<td>3%</td>
</tr>
</tbody>
</table>

n = 299 heads of sales, sales operations and sales analytics

Source: 2020 Gartner State of Sales Operations and Analytics Survey

Q: How would you rate the level of sales data proficiency (i.e., understanding of what information is available and how it can be used to solve business problems) for these stakeholders/functions in your organization?

Note: Highly proficient is 6 and 7 on a 7-point scale.

Percentages may not add up to 100% because of rounding.

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Disparity in data literacy levels within the organization can be traced to the mission of many sales analytics functions. Our survey data shows more sales analytics functions focus on fulfilling sales stakeholders’ individual requests than enabling those stakeholders to become more self-sufficient in preparing and interpreting analytics. In organizations where the sales analytics function does not actively invest in making stakeholders more self-sufficient, the motivation for stakeholders to improve their data literacy is low. In other words, sales managers who obtain much of their analytical insight through ad hoc requests to sales operations don't develop the ability to express their business questions in terms of standard metrics. And, they don't navigate existing channels to obtain the answers they need.

Gap Analysis and Interdependencies

Significant gaps emerge between the future and current states of sales analytics, and these gaps must be addressed as part of any migration plan. These gaps include:

Limited Participation in Analytics Selection and Design

Sales analytics teams aren't building a comprehensive understanding of the sales-related analytics needs of the larger nonsales organization, nor are they gaining a deep appreciation for the variances in data dialects spoken throughout the organization.

As a result, opportunities to develop analytics that meet the true needs of all commercial functions are missed. More importantly, insights that could be shared among functions to drive more cohesive decision making aren't being widely adopted.

Analytics Adoption Inhibited by Low Data Quality and Trust

A vicious cycle of poor data quality exists in many organizations. System data is perceived as incomplete or incorrect, which leads to low adoption of analytics. Low adoption in turn translates into low motivation for users to maintain acceptable levels of data quality, thus feeding the cycle.

Unfortunately, widespread adoption of sales analytics both within sales and beyond is impossible when this cycle exists. Rather than driving cross-functional efforts to improve data quality and trustability, organizations experiencing this condition often settle for supplementing their data with anecdotal evidence and gut feel.

Incomplete Integration of Channel Interaction Data

B2B buyers show a growing preference for engaging with suppliers through digital and self-service channels. These channels — often owned by siloed functions within the commercial organization — span systems and databases. Few suppliers have the integration in place to provide a systematic, holistic view of the customer's digital and nondigital interactions. And even fewer have the technology in place to interpret those signals, assess the progress of a purchase decision and recommend next steps.

This leaves multiple functions in the commercial organization to rely on citizen data scientists — stakeholders in nontechnical roles who can extract predictive and prescriptive insights from data — to
loosely correlate disconnected signals and draw conclusions as best as possible. This lack of integration also makes it harder for sales managers to effectively coach their sellers on individual deals or on overall performance, if the only easily accessible data is in the CRM system.

More information on citizen data scientists’ role in sales analytics is found at Transform Sales Operations for the Future.

Gaps in Data Literacy Limit ROI on Sales Analytics

Even as new technologies make analytics consumers more autonomous (and less dependent on citizen data scientists), all consumers need to understand the underlying meaning of the metrics presented to them. As the organization becomes more data-driven and additional data sources are integrated, metrics will become ubiquitous in all business processes.

The need for data literacy only becomes more urgent as technology improves. To be clear, data literacy does not include a detailed understanding of the algorithms that produce advanced analytics. For the consumer of sales analytics, data literacy requires a common understanding of data sources and constructs as well as the applicable use cases for a particular metric or data-based insight. Stakeholders need better literacy to recognize where analytics can be best used, and to foster collaboration among functions.

Migration Plan

To overcome these gaps and realize the benefits of the future state of sales analytics, sales operations leaders must focus on achieving a set of strategic objectives:

- Align stakeholders on a vision and prioritization of use cases for sales analytics.
- Establish data governance to enable high-quality collaboration.
- Elevate levels of data literacy throughout the organization.
- Prioritize analytics technologies for specific use cases based on potential business impact.

These objectives may take years to fully achieve, since the effort could involve and impact all members of the commercial organization. To be achievable, the overall roadmap must be scaled down into more tangible and attainable milestones depending on each organization’s current state. Figure 7 provides an illustration of such a timeline.
Figure 7. Strategic Roadmap Timeline for Sales Analytics

Strategic Roadmap Timeline for Sales Analytics

- Set vision for sales analytics with enterprise-wide reach and relevance
- Define strategies for data governance, data literacy and technology
- Identify data dialects
- Triage data standardization activities
- Prioritize analytics use cases
- Assess current technology capabilities and identify gaps
- Create dictionary of metrics
- Execute data literacy learning curriculum
- Sustain data quality standards
- Prioritize analytics technologies

Timeline indicates when to begin.

Source: Gartner
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A customizable version of this timeline is available at Toolkit: 2021 Strategic Roadmap for Sales Analytics.

Short Term

Short-term tasks create a foundation for success but also provide immediate benefits. These activities must be executed first so the organization is prepared for later phases of the transformation. Short-term tasks should be focused on setting and communicating a vision for the future of sales analytics. Thus, they ensure the organization has the awareness and motivation necessary for significant change to be made. Sales operations leaders should begin these activities right away:

- **Build an analytics vision.** The key to any analytics initiative is a clear vision for the organization and its customers. A common value proposition for all stakeholders ensures the appropriate data sources are included and the right investments are made in supporting analytics tools. A good vision will relate the data and analytics in the sales organization to the business purpose, preferably expressed in terms of customer value. A vision needs to —
  - Align with the company’s overall objectives or mission, explaining how data and analytics contributes to the overall picture.
  - Focus on external stakeholders and the bigger picture, not solely internal decision making.
Be relevant, specific and unique to the organization.

Be inspiring and authentic, really making a difference.

**Identify stakeholders and business needs for sales analytics.** Internal and external stakeholders each contribute to realizing the sales analytics vision. Therefore, a successful sales analytics vision must incorporate the strategic goals of all stakeholders. Clearly identifying those involved and their needs helps identify the analytics tool that requires further investment to guide the strategy. For example, understanding the ways customers engage with the sales organization may reveal a need for journey mapping analytics and technology. This creates new sources of value for the organization and the customers alike.

**Build a value proposition.** Sales operations leaders can build support for sales analytics initiatives and technology investments by preparing a value proposition that resonates with senior leadership. Three distinct approaches are common for sales analytics value propositions. They are —

- **Sales analytics as a utility:** This focuses on the ability to remove data management and analysis roadblocks to quickly unlock and access a wide variety of data sources, regardless of the specific use case. The governance must establish and monitor service level objectives and agreements to ensure sales analytics are continually available.

- **Sales analytics as an enabler:** This focuses on providing access to the data sources needed to fulfill specifically identified use cases. The governance is based on achieving planned business outcomes. For example, augmented analytics and X analytics investments can help enable more effective interactions with potential buyers.

- **Sales analytics as a driver:** This requires quick access to data sources of all kinds for discovery purposes. The governance aims to ensure new insights are adopted and the ability to make this a recurring process. This will be relevant to CI initiatives.

These value propositions do not comprise a maturity curve. They each have a place in the sales organization dependent on which stakeholders are involved. Sales operations leaders must determine which value propositions best resonate with different stakeholders and engage with them accordingly.

- **Create a data governance strategy aligned with the analytics vision and business goals.** To ensure relevance, link the data governance strategy directly to the goals and challenges of each function that sales analytics needs to coordinate with.

- **Determine the right level of maturity for the data governance strategy.** Do not assume that data governance needs are identical for all functional partners that sales analytics works with. Assess and prioritize the need for capability building for each internal partner. Recognize that the need for change comes with varying degrees of urgency; when appropriate, plan incremental changes over longer periods.
- **Define a data ownership model collaboratively with partners.** Build a shared data ownership model that includes clear roles and responsibilities to ensure governance decisions address the interests of all involved business groups.

- **Identify a data literacy executive sponsor.** Improving data literacy requires active support and participation from stakeholders in multiple business functions. So, a data literacy program must have an executive sponsor who champions the effort. The executive sponsor should drive initial communication highlighting the organization's current challenges, introducing key team members and soliciting multifunctional support.

- **Communicate a strategy for building enterprisewide data literacy.** Establishing a shared enterprisewide vision for how data literacy will improve commercial effectiveness, and a clear strategy for building it, is essential to enlisting support for this change effort. Sales operations leaders must work with the executive sponsor for data literacy and leaders from all stakeholder groups to understand the critical challenges that their collective effort must overcome. The strategy for building data literacy will likely be interdependent on the strategies for data quality and technology. Commercial leaders should construct a compelling vision and a common strategy for their teams to work toward.

- **Understand data dialects.** Within every organization, dialects emerge within various functional groups. This occurs because different processes and different data objects are central to the missions of different teams. For example, the measure of product performance may be very different for a product marketing manager than it is for a sales compensation analyst. Sales operations leaders must discover and document the data dialects that exist in their organization. This allows sales operations to ensure they support these dialects' specialized needs as process and technology changes are introduced.

- **Triage data standardization activities.** Setting universal data standards is time- and cost-prohibitive. Identify data and information that must be standardized at the enterprise level by analyzing usage patterns and common information needs.

### Medium Term

Medium-term tasks will leverage the momentum established by the successes of the short-term tasks. These activities require that a transformation effort has been established and buy-in from key stakeholders is secure. Medium-term tasks are focused on advancing the reach of data governance, furthering improvements to data literacy, and improving technology to support multiexperience selling. Sales operations leaders should undertake these activities next:

- **Inventory key use cases where analytics have high business impact.** Improving data literacy must happen from the ground up. In other words, data literacy requires that for every business use case, stakeholders agree on the business objective, the information requirements and the most appropriate
analytics to drive decision making. More information on this approach and our Value Information and Analytics (VIA) model is found in Boost Data Literacy to Improve Value of Sales Analytics. Sales operations leaders must inventory the key use cases where sales analytics plays a critical role and identify relevant stakeholders for each use case. Once those key use cases are known, sales operations must:

- Prioritize use cases for cross-functional review.
- Communicate a timeline for use-case review sessions using the VIA model.

**Prioritize analytics technology based on sales use cases.** A significant piece of building a sales analytics technology roadmap entails a clear understanding of business requirements. No single solution will meet all analytics needs, so sales organizations must invest in multiple tools to support specific sales use cases. For example, customer lifetime value analysis cannot be done with the same tools that support sales coaching via conversational interfaces commonly seen in conversational engagement analytics.

**Assess current sales analytics technology capabilities and gaps.** This area of the sales analytics roadmaps will be the bridge from the vision and value proposition to the operating model. Sales analytics stakeholders (including those in IT and data and analytics) must do a clear-cut evaluation of gaps in their technological capabilities. Understand and accept the fact that more than one vendor may be needed to achieve your ideal sales analytics state, dependent on use cases. After assessing your current capabilities and gaps, sales operations leaders must do the following in order —

- Segment the users and deploy corresponding analytics tools based on each segment’s use case and required capabilities.
- Pilot and deploy analytics and data science tools for a small group of users. Consider their willingness to work with varying stakeholders, such as those in IT and the enterprise analytics function.
- Collect user feedback and needs to improve the pilot and to resolve analytics challenges. The objective is to meet or exceed user expectations and to gain buy-in.
- Assess whether the sales analytics users are ready to expand the use of the tool for wider deployment.
- Reduce overlap within existing tools already implemented for a similar use case or category, and publish clear guidelines of when to use which tool based on these use cases.

**Establish a dictionary of sales metrics.** Enterprisewide data literacy requires that consumers of data and analytics share a common understanding of the information and metrics that drive business processes. To this end, sales operations leaders should establish a dictionary of standard commercial metrics. Metrics definitions should map to use cases and must include data sources, calculation rules,
known input data quality considerations and update frequency. Sales operations leaders must promote the use of this dictionary with stakeholder groups to achieve a common understanding of metrics.

- **Centralize resources.** The volume and quality of cross-functional collaboration is affected by the organization of shared resources. Pool data and information as centrally as possible to facilitate cross-functional access.

- **Apply known literacy levels when considering usability.** When establishing a sales analytics tech stack, sales operations must understand the data proficiency levels of sales analytics consumers as well as the delivery mechanisms they prefer. Some may need analytics tools that make it easy to digest insights via feeds, and some may want to be able to explore insights via visualization capabilities. This understanding is essential to user adoption since users consume analytics on multiple devices and form factors, such as wearable devices and desktops. Additional implications depend on generational dexterity, with an increasing workforce of millennials and Gen Z workers filling sales organizations. The continued evolution of usability requirements will dictate the analytics investments needed to support these users.

- **Implement a data literacy learning curriculum.** Through regular assessment of their organizations’ developing data literacy, sales operations leaders will gain a sense of which functions need the most data proficiency assistance. Sales operations leaders should identify key topics for a data literacy learning curriculum that address critical use cases and answer the most common questions that arise from these functions. For each topic, sales operations can identify the appropriate experts and get their recommendations on how to develop a reusable learning resource (e.g., a webinar on the account planning process and related analytics, with best practices for providing quality data and interpreting analytics).

**Long Term**

Long-term tasks build upon the accomplishments of the short-term and medium-term activities to complete the transformation of the sales analytics function. Long-term tasks are designed to sustain the benefits of improved sales analytics through continued education, metrics and communication. Sales operations leaders should complete their roadmap for sales analytics with these closing activities:

- **To ensure ongoing adherence to data quality standards over time, formally define long-term ownership terms and responsibilities.** Balance and articulate responsibilities for maintaining information integrity between sales analytics and other business leads to ensure those using the information are also responsible for maintaining its quality.

- **Build smaller business partner cohorts for standardization efforts.** When the needs and capabilities of participating groups are not differentiated, data standardization efforts can become theoretical
exercises that ignore the realities of many functions. Partner with citizen data scientists across functions to determine the appropriate balance of standardization and flexibility.

- **Make information quality transparent.** Make data quality efforts transparent to increase users’ trust in shared collections of data. Transparency will also facilitate the resolution of data quality issues that require cross-functional collaboration.

- **Define metrics to quantify data literacy.** Sales operations leaders must define a set of metrics to quantify the level of data literacy in their organization, by functional group where possible. This exercise should start with enterprisewide objectives. For example, say an enterprise objective is to align functions on a common set of metrics and standard reports. One data literacy metric could be the percentage of analytics requests in which the person making the request is redirected to an existing standard report and no new variation must be created. Similarly, the usage of standard reports can serve as a measure of data literacy, showing how well the organization is adopting consistent analytics. Sales operations may also periodically survey stakeholders to qualitatively measure the value of existing analytics, including specific questions to gauge data literacy levels.

- **Assess and communicate current data literacy levels across the enterprise.** Sales operations leaders should conduct an annual assessment of data literacy levels throughout their organizations or actively participate in an assessment led by the chief data officer (CDO) or IT. Results of the assessment must be communicated throughout the organization to reinforce progress made. Sales operations should identify cases where individuals and teams are using data in innovative ways and recognize their successes. Along with this assessment, sales operations leaders should look into the organization to identify individuals with above-average data proficiency. These advanced users are often willing to help drive data literacy improvement efforts within their functional groups. Sales operations leaders should design a focused outreach to gain those users’ support and should enlist the users’ executive sponsors to help recruit such participants.

- **Assess sales analytics skills.** Due to low data literacy within commercial organizations, any investment in the sales analytics roadmap must be made with consideration of the skills the organization will need now and in the future to support such an investment. Analytics tools are becoming increasingly business friendly, but barriers to adoption still exist. In organizations where sales analytics skills are not pervasive, prebuilt or packaged analytics can be attractive.

- **Create an operating model to deliver on needed analytics changes.** Dependent on the use case and stakeholders, there are multiple ways to deliver on the analytics vision and value proposition. Three types of delivery models are likely parts of an operating model —
  - **Project:** A delivery approach used by a service or resource center where sales analytics staff are assigned to deliver functionality with a particular aim, in coordination with IT or D&A stakeholders. Projects have a defined start and end.
Program: A delivery approach consisting of a collection of projects, competencies and capabilities related to a topical scope that persists over time, such as data governance or data literacy programs.

Product: A delivery approach that aggregates the data and analytics capabilities consumed by either the sales organization or customers who are reliant on a continuing flow of data and insights. This could be predictive opportunity scoring or customer insight products such as a customer data platform (CDP).

Evidence

1. 2020 State of Sales Analytics

2. Predicts 2020: AI for CRM Sales Technology Must be Balanced With Analytics, Training and Change Management Considerations

Recommended by the Authors

The Future of Sales in 2025: A Gartner Trend Insight Report
The State of Sales Analytics, Part 1: Sales Operations’ Role and Effectiveness
The State of Sales Analytics, Part 2: Cross-Functional Interactions and Data Literacy
The State of Sales Analytics, Part 3: Data Governance and Data Quality
How to Deploy Advanced Sales Analytics Without a Data Scientist
How Sales Operations Can Build a Business Case for Data and Analytics Governance
Boost Data Literacy to Improve Value of Sales Analytics
Advanced CRM Sales Analytics Requires Trust-Based Data and Analytics Governance

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