

2023 The Sales Specialists Survey

Company Profile

1. Which of the following best describes your company?

Select only one.

- ☐ Software
- ☐ Primarily Hardware / Equipment Manufacturer
- ☐ Technology Services Provider

2. Which of the following BEST describes the mix of offers that your company sells?

Select only one.

- ☐ Mostly Transactional Product and License offers (hardware purchase, on-premise software, etc.)
- ☐ Mostly Subscription-based offers (XaaS, SaaS, Managed Services, etc.)
- ☐ About the same amount of the above types of offers

3. What are your company's total annual revenues?

Please write out the full amount; e.g. \$2,000,000,000 vs. \$2B.

_____USD

Specialist Operations

Definitions:

Product or Offer Specialist: A Sales resource who is charged with selling a particular offer or offers. This role may focus on specialized product or service offer, such as Managed Services or Cloud, or a new offer that is separate from the core offer that an Account Executive is responsible for selling.

Business or Industry Specialist: A Sales resource who has expertise in a particular line of business or vertical (finance, industrial equipment, healthcare, etc.) or aspect of a customer's business (HR, Marketing, etc.) and focuses on particular market segment(s) aligned with their expertise.

Account Executive: The primary Sales resource for a given customer or set of customers.

1. Which of the following types of Sales Specialists does your company have?

Select all that apply.

☐ Product or Offer Specialists (including Service sales specialists)

☐ Business or Vertical Specialists

☐ Other - Write In (Required): _____ *

2. When a specialists is involved with a sale, what is the average difference in the sales cycle from a similarly sized sale where the specialist is NOT involved?

☐ More than 20% faster

☐ 0-20% faster

☐ About the same

☐ 0-20% slower

☐ More than 20% slower

3. How is the variable compensation for your specialists structured?

- () Mostly commission
() Mostly annual bonus or MBO
() Even balance of commission and annual bonus/MBO
() Other - Write In (Required): _____ *

4. What is the typical annual dollar revenue target for your specialists (USD)?

_____ Revenue Target

5. What is the average annual On-Target Earning (OTE) for your specialists (USD)?

_____ Annual OTE

6. What percent of your specialists' OTE comes from the following?

_____ % Salary Compensation
_____ % Variable Compensation

Product or Offer Specialists

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1. Which types of products or offers do you have specialists focused on?

Select all that apply.

☐ XaaS or Subscription offers

☐ Managed Services

☐ Traditional Services (Professional Services, Support Services, Education Services, etc.)

☐ Other - Write In (Required): _____*

2. At what level of maturity are the offers you are supporting with Product or Offer Specialists?

☐ Emerging offers only

☐ Established & Mature offers only

☐ Both of the above

3. Which of the following best practices do you have in place to support your Product or Offer specialists

Select all that apply.

If "other" please describe in the comments section of this question.

☐ Dedicated marketing or lead generation for the new offer

☐ Repeatable sales plays

☐ Documented and accessible account plans

☐ Analytics-generated account insights

☐ Offer-aligned technical resources

4. After a new offer that requires the support of a Product or Offer specialist is launched, how long, on average, does it take for the offer to be sold by your Account Executives (generalists), no longer requiring specialist involvement?

☐ 0-24 months

☐ 24-48 months

☐ Longer than 48 months

☐ No intent to return duties to generalists

For questions 5 and 6, describe the level of participation by your Product or Offer Specialists in each stage of the sales funnel. If they do not participate in any given stage below, please leave that option blank.

5. Which stages in the funnel are your specialists RESPONSIBLE for driving?

This means that the specialist has primary responsibility for the motions involved at that stage of the sales process, and the account executive plays a supporting role.

Select all that apply.

- ☐ Early Funnel (Identification, qualification, etc.)
- ☐ Mid Funnel (Solutioning, proposal generation, pursuit, etc.)
- ☐ Late Funnel (Negotiation, Closing, etc)
- ☐ Post Sale (Deployment, transition to Customer Success, etc.)

6. Which stages in the funnel are your specialists INVOLVED in driving?

This means that the specialist has primary responsibility for the motions involved at that stage of the sales process, and the account executive plays a supporting role.

Select all that apply.

- ☐ Early Funnel (Identification, qualification, etc.)
- ☐ Mid Funnel (Solutioning, proposal generation, pursuit, etc.)
- ☐ Late Funnel (Negotiation, Closing, etc)
- ☐ Post Sale (Deployment, transition to Customer Success, etc.)

7. Approximately what percentage of your deals require heavy (more than 20%) customization of your base offering?

_____ % Heavy Customization

8. What is the ratio of Product or Offer Specialists to Account Executives? (Specialists / Account Executives).

Consider the total number of product or offer specialists your company employs, not just those supporting a single offer.

If you do not assign specialists to any given tier below, please leave blank.

_____ Specialists to 1 Account Executive for Enterprise Accounts

_____ Specialists to 1 Account Executive for Mid Market

_____ Specialists to 1 Account Executive for SMB Accounts

Business or Industry Specialists

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For questions 1 and 2, describe the level of participation by your Business or Industry Specialists in each stage of the sales funnel. If they do not participate in any given stage below, please leave that option blank.

1. Which stages in the funnel are your specialists RESPONSIBLE for driving?

This means that the specialist has primary responsibility for the motions involved at that stage of the sales process, and the account executive plays a supporting role.

Select all that apply.

- ☐ Early Funnel (Identification, qualification, etc.)
- ☐ Mid Funnel (Solutioning, proposal generation, pursuit, etc.)
- ☐ Late Funnel (Negotiation, Closing, etc)
- ☐ Post Sale (Deployment, transition to Customer Success, etc.)

2. Which stages in the funnel are your specialists INVOLVED in driving?

- ☐ Early Funnel (Identification, qualification, etc.)
- ☐ Mid Funnel (Solutioning, proposal generation, pursuit, etc.)
- ☐ Late Funnel (Negotiation, Closing, etc)
- ☐ Post Sale (Deployment, transition to Customer Success, etc.)

3. Which of the following best practices do you have in place to support your business or industry ?

- ☐ Hiring criteria: Work experience in the verticals or industries they are focused on
- ☐ Dedicated marketing or lead generation
- ☐ Repeatable sales plays
- ☐ Documented and accessible account plans
- ☐ Analytics-generated account insights
- ☐ Thought leadership opportunities (speaking, blogging, etc.)

4. What percentage of deals for your offer require Business or Industry specialist involvement?

_____ % Deals

5. What is the ratio of business or industry Specialists to Account Executives? (Specialists / Account Executives).

Consider the total number of vertical or industry specialists your company employs, not just those supporting a single vertical or industry.

If you do not assign specialists to any given tier below, please leave blank.

_____ Business Specialists to 1 Account Executive for Enterprise Accounts

_____ Business Specialists to 1 Account Executive for Mid Market

_____ Business Specialists to 1 Account Executive for SMB Accounts

6. What is the percentage of your new sales and major cross sells where the line-of-business is driving the purchasing decision (as opposed to the IT department)?

_____ % Driven by line of business

Key Metrics

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1. What is your company's annual Growth Rate for the last 12 months in the following categories?

_____ Overall Growth Rate

_____ Technology Subscription

2. What is the percentage of your overall company revenues that your company spent on Sales and Marketing in the last 12 months?

% of Revenue on Sales and Marketing = All costs associated with your direct and indirect sales channels, including Administrative, Salary, Commission, Incentive Pay, T&E, Operations, etc, and all costs associated with Marketing

_____ % Revenue spent on Sales and Marketing

3. What is your company's Win Rate for the last 12 months for new opportunities and major cross sells?

_____ Win Rate

Thank you for your participation!