



# Five steps to accelerate meaningful sales transformation

**A framework for sales leaders  
to rethink operations**

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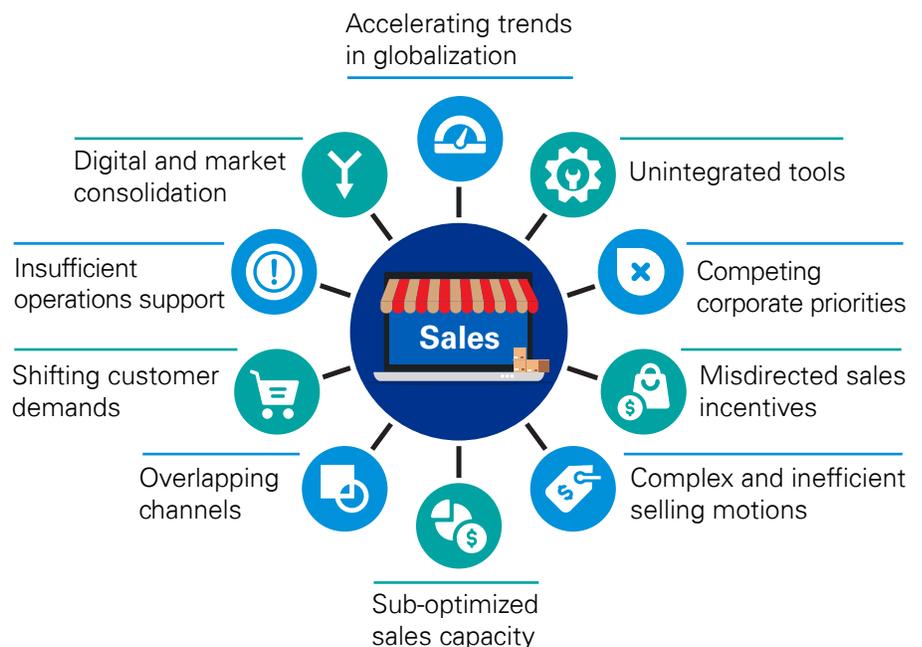
## You face mounting pressure to drive profitable growth. In a period of significant change, with economic disruption and accelerating trends in globalization, digital, and market consolidation, you need to balance a multitude of tactical and strategic objectives—all while managing internal issues and shifting customer demands.

Unfortunately, your sales operating model may hold you back. Many sales models today are **inflexible, disconnected, and unintelligent**. When every day strategic shifts occur, they don't easily adjust to support commercial strategies like new product launches, updated business models, and acquisition integrations.

As your organization struggles to react, you may find yourself tactically "polluted" by overlapping channels, sub-optimized sales capacity, complex and inefficient selling motions, misdirected sales incentives, and poorly designed, unintegrated tools.

Unworkable sales operating models hamper your ability to respond internally, but the challenges extend to your customer interactions as well. Customer demands must be met to win against competition and expectations are high. B2B customers increasingly expect B2C-like interactions, with streamlined, on-demand, and personalized customer experiences.

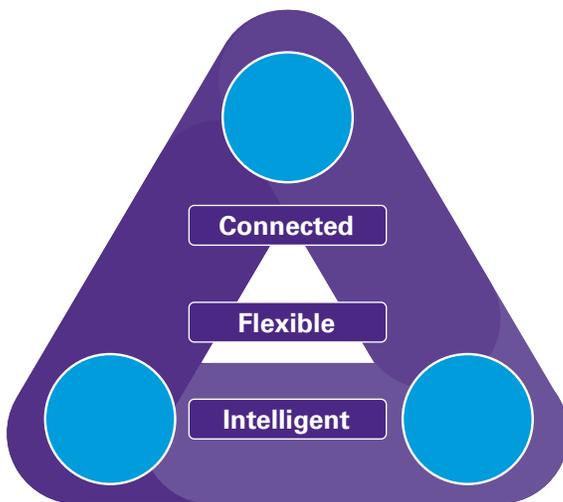
As customer needs evolve, your commercial motions, value props, and tech enablement must evolve along with them. For example, as traditional customer segments morph and adapt, the work-from-anywhere trend accelerates, and buyer journeys proliferate, organizations must build sophisticated hybrid models that are flexible, connected, resilient and digitally empowered.



**Figure 1: Internal and external stresses on sales teams**

# Overcoming the challenges

Sales teams need these qualities to succeed:



## Connected

- Part of a seamless customer experience and go-to-market strategy across marketing, sales, and service that drive differentiated and high-impact customer experiences

## Flexible

- Tactically “decontaminated” from inefficient legacy processes and structural suboptimization to keep pace with changing customer needs, business strategy, solution portfolios, and competition

## Intelligent

- Ready to take advantage of rapidly expanding data, automation, insights, and artificial intelligence capabilities

Unfortunately, many sales organizations struggle with:

- **Siloed organizations**—Sales organizations often are disconnected from marketing campaigns, personas, and strategies, creating disjointed market messaging and blunting seller effectiveness. Service teams often have limited knowledge of sales objectives and key customer relationships and accounts, hampering retention and penetration efforts.
- **Reactive and tactical mentality**—Sales organizations are inherently focused on near term revenue objectives instead of longer-term strategic change. Over time this leads to “polluted” structures, processes, and execution efforts.
- **Overwhelming new systems and tools**—Sales organizations are faced with a proliferation of systems and solutions. They struggle to absorb these improvements fast enough to maintain pace with changes in the market. This negatively impacts seller experience, sales performance, and cost of sales.
- **Struggling digital transformations**—Sales organizations are heavily impacted when digital projects that involve customer data become disjointed or are incomplete. Rather than striving to “be digital” and truly transform, many sales organizations just seek to “do digital” and layer more complexity atop their already challenged models. Sales teams become entangled in competing organizational priorities, disconnected processes, incomplete information, and a constant barrage of changes.

# Call to action:

## Modernize your sales organization. A revolution or an evolution?

Savvy leaders are taking stock of their commercial strategic roadmaps, end-to-end processes, and technology stacks to ensure above-market revenue growth, profitability, and sales ROI.

To decontaminate your sales operating model and create sustainable resilience, begin a sales transformation journey with a detailed review of current-state issues and opportunities. This means using a systematic framework, best practices, market benchmarks, and in-depth analysis to determine the level of change and required investments.



**Figure 2: A systematic framework for sales transformation**

While there is no ‘one size fits all’ sales transformation approach or playbook to recraft your go-to-market strategy, KPMG offers a framework (see above) to determine the size of the transformation, identify the biggest potential ROI, and create a roadmap for change. This framework uses leading practices and was developed from our experience with many organizations.

Here are **five important steps** to take as you consider your transformation:

- 1. Align your strategy**
  - Align sales strategy with external changes, trends, and investments. Invest in customer insights to confirm and evolve segmentation, coverage models, and channel strategy. Confirm sales capacity is ready to meet—and hopefully exceed—demand. Evaluate partners and retune partner programs.
  - Then, align sales internally with marketing, service and other corporate functions. This ensures coordinated commercial investments and outcomes.
- 2. Operate consistently**
  - Future-proof and modernize your sales operating model. Use tools, governance, and processes that ensure the minimum touchpoints and the maximum consistency from lead to cash.
  - Simplify jobs and tighten up job definitions. Create stronger linkages and clear rules of engagement between front-office functions. Align pipeline management processes and tools, monitor key metrics, and tackle variance.



### 3. Drive seller effectiveness

- Invest in and optimize sales enablement and performance management programs that drive seller experience, such as business intelligence, sales training, and incentive compensation.
- Evaluate seller workflows and reduce friction points. Regularly collect and disseminate selling best practices and provide a path to exit poor performers.
- Tweak the talent acquisition process and competency models to align to sales operating model changes. Update onboarding, coaching, and career advancement protocols and tools.



### 4. Future-proof sales ops

- Evolve from sales ops to revenue ops by bringing customer insights and proactive commercial technology investment. Become a data management and governance hub.
- Mine the deep well of client and sales data with AI, machine learning, and automation and become a revenue insights factory.
- Automate and put procedures in place for all table stakes sales ops functions to drive scale, such as territory, quota, and incentive compensation design.

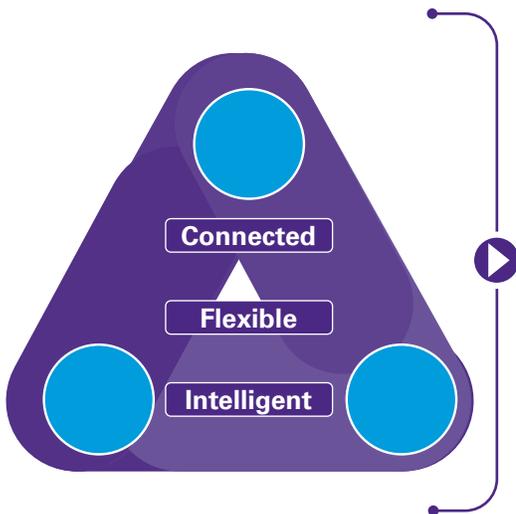


### 5. Capture tech stack value

- Enable winning seller and customer experiences with a technology ecosystem that supports (not inhibits) the organization.
- Update and simplify CRM processes and consolidate instances where possible. Build CPQ into CRM to drive pricing and contracting discipline, expand margins, and improve forecast visibility.
- Assess and modernize all supporting sales administration platforms for incentives, territories, quotas, and training.

### Connect the dots: Become connected, flexible, and intelligent

Leaders use this five-step framework to pull the right sales optimization levers to get more flexible, connected, and intelligent sales organizations. But which steps should you tackle first? Are you focused on flexibility or is connectivity your key issue? The figure below identifies starting points to help you focus sales transformation efforts and key steps to begin the journey.



Sales Transformation Steps		What impact will this step have on your ability to be connected, flexible and intelligent?		
		Connected	Flexible	Intelligent
Align your strategy				
Operate consistently				
Drive seller effectiveness				
Future proof sales ops				
Capture tech stack value				

**Figure 3: Aligning the transformation framework to impacts you can achieve**

# We can help

If you are ready to take the next step in improving your sales performance, our team includes a deep bench of talented professionals with current, relevant experience in each of these fields. We stand ready to work with you and your team.

 <p><b>1. Align your strategy</b></p>	Customer Insights & Segmentation	Go-to-Market Strategy	Sales operating model	Channel strategy	Capacity & Coverage planning	Partner Strategy & Program Design	
 <p><b>2. Operate consistently</b></p>	Lead & Opportunity Management	Account Planning & Management	Discounting & Deal Management	Pipeline Management & Forecasting	Partner Management	Customer Success Management	
 <p><b>3. Drive seller effectiveness</b></p>	Talent Performance Strategy	Sales Competency Model	Talent Acquisition	Onboarding & Training	Coaching & Development	Incentive Compensation Design	Performance Management
 <p><b>4. Future-proof sales ops</b></p>	Territory & Quota Management	Order & Contract Management	Incentive Compensation Management	Customer & Partner Data Governance	Business Intelligence & Insights	Seller & Partner Experience Management	Sales & Partner Adoption
 <p><b>5. Capture tech stack value</b></p>	CRM/PRM	Territory Quota administration	Sales training platform & tools	CPQ	Incentive compensation administration	Customer & Partner portals	Sales content administration

**Figure 4: KPMG offerings to support each step in the framework.**



# Contact us

For more information on sales transformations or any of the specific topics listed above, please contact us to begin the conversation. Or, if you have a preferred KPMG representative, they will also be able to facilitate introductions.



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