Enhancing sales agility:
The key to unlocking sustainable revenue performance

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Increasing agility in sales

In today's constantly evolving sales landscape, organizations must remain agile to stay ahead in a complex commercial ecosystem. They need to understand, engage with, and serve customers effectively, while maximizing growth and profitability. What's more, as customer needs shift, sales teams must adapt quickly and overcome challenges brought by competitors, product updates, and business upstarts.

That's where an "agile sales" business model comes in. A well-developed agile sales model can help a company:

Develop and maintain a robust **customer segmentation model** to guide the allocation of resources.

Uncover **effective strategies** and test them in real time without causing major disruptions or taking risky bets on sales plays that might fail.

Effectively **manage opportunities** across the sales cycle, including quick and accurate configuration, pricing, and quoting.

Connect and leverage data across the enterprise to generate actionable insights that inform territory, quota, and incentive planning.

In this paper, we will discuss how sales organizations can streamline their processes; increase efficiency; and deliver exceptional seller, and thereby customer, experiences with an agile sales organization. We will also set out a blueprint for designing and implementing an agile sales process that your organization may want to adapt.

Benefits of an agile sales approach

An agile sales model offers significant advantages over legacy sales approaches, including:

— **Higher lead-to-conversion ratios,** thanks to adaptive and targeted sales strategies

— **Shorter sales cycles,** driven by more effective customer interactions and quicker deal closures

— **Increased customer retention and loyalty rates** due to a greater understanding of customers' desires and how to best engage with them

— **Higher revenue growth,** a result of a healthy sales pipeline, satisfied customers, and effective market opportunity capture

— **Greater customer lifetime value,** stemming from more effective cross/up-sell and renewal sales motions

— **Enhanced account penetration rates,** as sales teams are able to seize emerging account opportunities more effectively

— **Improved sales efficiency** due to real-time adjustments in tactics and more effective resource allocation.

These are all essential elements for sustaining year-over-year revenue growth. By increasing agility in sales processes, organizations can make significant improvements in key performance indicators (KPIs) and foster sustainable growth in competitive markets.

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Agile sales approach clears up cloud of 'sales pollution'

Sales teams often seem to be among the last to embrace change, as leaders fear disrupting revenue streams. But this reluctance often leaves sales teams trapped in a cloud of "sales pollution" created by the following factors:

Rapid growth

New revenue models

High turnover

M&A

Company culture

New products/service

Poorly adopted technology

Increased costs

Compromised customer and seller experiences

Inefficient and legacy manual sales processes

**Misalignment of roles and responsibilities**

Customer acquisition/ retention issues

An agile sales approach can help clear up this sales pollution.

Understanding the agile sales framework

The agile sales process is all about adapting to the ever-changing market conditions and customer needs quickly and efficiently. Here is our four-part framework that can help you establish an agile sales process:

Four keys to the agile sales model

Customer at the center

Scan · Plan · Act · Measure
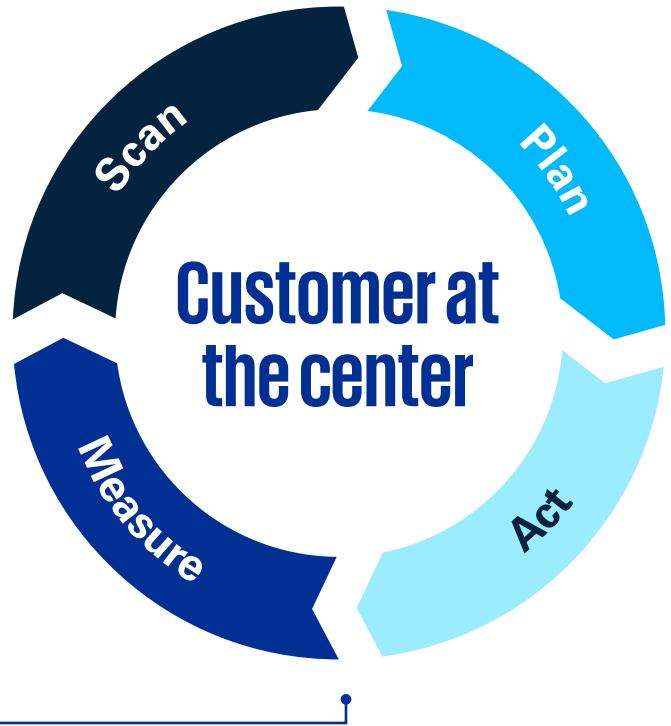
1. Scan

Scan customer segments and customer engagement points and look for opportunities where you can reduce seller, partner, or customer friction. This involves continuously monitoring market nuances and customer preferences to identify areas for improvement and where you can adapt your sales strategies accordingly.

2. Plan

Plan in real time and rapidly create sales plays. Agile sales teams should be capable of anticipating fluctuations and creating sales strategies on the fly. To do this, however, they need to leverage advanced analytical tools and market insights. With these tools and insights, sales teams can quickly develop and deploy sales strategies that capitalize on the emerging opportunities.

3. Act

Act on these plays by shifting resources, incentives, messaging, and processes. This step entails quickly reassigning sales resources, adjusting incentives, refining messaging, and fine-tuning the sales processes to execute the new sales strategies effectively.

4. Measure

Measure the impact and iterate the overall sales model based on what works. Agile sales teams must constantly assess the outcomes of their actions, using relevant KPIs to gauge effectiveness and adjust their sales model accordingly to incorporate lessons learned to boost sales performance.

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Potential drawbacks to agile sales model

Inherent in an agile sales model is the need to remain alert and responsive to necessary changes. However, bear in mind that frequent changes to the sales model can lead to inconsistencies in execution, cause confusion among sales roles, and disrupt customer relationships.

Moreover, the process of constantly evaluating and refining sales strategies can consume a lot of time and resources that could otherwise be dedicated to sales-related activities. As a result, rapid changes might also make it difficult for sales teams to adapt and develop a solid understanding of the new approach—especially if changes are made too frequently.

Additionally, short-sighted or short-term strategies can sometimes overshadow the importance of long-term relationship building and customer satisfaction. Eventually, this perception can lead to a negative perception of a company among customers.

Therefore, it is crucial for sales leaders to balance the need for updating sales models based on short-term or sales-driven tactics with proper forethought, planning, communication, and training. The organization must remain agile, adaptable, and flexible while maintaining a strong focus on long-term customer relationships and satisfaction.

It is essential to strike a balance between a rigid commercial model—which does not accommodate diverse customer needs—and one that is too flexible—resulting in confusion and difficulty scaling.

Sales strategy vs sales execution

Sales models can be broken down into two key components:

Sales strategy

This involves high-level planning that focuses on criteria such as:

— Target market

— Value proposition

— Sales channels

— Pricing

— Goals

— Incentives

— Sales enablement.

It outlines the methods and approach for reaching revenue goals and creating positive customer experiences.

Sales execution

This includes the action steps taken by the sales team to implement the sales strategy. These include:

— Prospecting for potential customers

— Conducting outreach

— Configuring solutions

— Obtaining pricing and quoting approvals

— Closing deals

— Managing relationships postsale.

These steps should be evaluated multiple times during the year.

By integrating an agile approach with a cohesive sales strategy and effective execution, companies can drive results, boost revenue, and foster strong customer relationships.

How to get started with an agile sales transformation

Below is a detailed, seven-step framework for getting started on a successful implementation of an agile sales model.

Step 1
Assess your sales operating model

Before initiating any transformation (agile or not), your organization should first evaluate its existing sales processes, infrastructure, and sales team capabilities. This enables you to identify gaps and areas in need of improvement.

This assessment should also include an analysis of customer segmentation techniques (see below), sales channels, pricing strategies, incentive programs, and technology platforms.

Once you have a comprehensive understanding of your current state of operations, you can establish a benchmark against which progress can be measured. This benchmark gives you a foundation for quantifying and proving how valuable your agile sales practices are and also shows you where to apply these practices so they can make the biggest difference.

Step 2
Segment your customers

An agile sales model requires a thorough understanding of who your customers are. So, it is crucial to develop detailed segmentation models that includes unique customer experience expectations, deep customer journey analysis, and other factors influencing their purchasing decisions (e.g., value drivers, competitive trends, etc.).

By examining customer segments closely, sales teams can cater to customer needs more effectively by adopting agile sales strategies, allocating sales capacity, shifting and/or reassigning sales resources, optimizing channel strategies, adjusting incentives, and designing effective territory assignments.

It also involves continuously monitoring market nuances, shifting demographics and emerging trends so you can detect areas for improvement and adapt your sales strategies accordingly so you're focusing on high-value opportunities that deliver optimal return on investment.

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Step 3
Set clear objectives

Your organization must establish clear objectives to be accomplished via the agile sales model that are aligned with your overall business goals. This step also involves defining relevant KPIs to help you track progress towards meeting these objectives.

You should also use advanced analytics tools and well-governed master data that are aligned with your objectives. These tools can enable you to accurately measure your progress and provide you with a tangible measure of success; conversely, they can also illustrate how far you have to go to accomplish your goals and why you may need to adjust your approach in real time and consider taking a different path.

Step 4
Develop an implementation roadmap

A practical and phased implementation roadmap that outlines the agile sales transformation initiative can be crucial to success.

The roadmap should be developed in conjunction with key stakeholders, including personnel from marketing, finance, operations, fulfillment and other appropriate departments. This approach will also help you develop executive support and cross-functional collaboration, and help ensure that your sales process is aligned with the broader organizational strategy.

Step 5
Choose the right enabling technology

It's essential to select and invest in the appropriate technology that will support your agile sales transformation journey, such as integrated customer relationship management systems, data analytics platforms, and artificial intelligence (AI) and sales performance management solutions. By leveraging these tools and the customer insights they generate, your sales teams can quickly develop and deploy sales strategies that capitalize on emerging opportunities.

The right technology will connect data from across your organization—marketing, finance, production, and other departments—and provide valuable, real-time, and synchronized market and sales performance insights to help your organization adapt its strategies quickly as business conditions evolve. These insights can be used to inform territory assignments, quotas, and incentive plans; help anticipate market trends; identify sales opportunities; and respond quickly to challenges.

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Step 6
Train and upskill the sales team

To give your agile sales transformation the best chance of success, your organization needs to invest in upskilling its salesforce so they understand new customer expectations, technology platforms, and processes. Training programs should focus on developing skills in data-driven decision-making, negotiations, customer relationship management, and product knowledge.

Also, keep in mind that easy-to-understand product offerings make it easier for sales teams to explain concepts to potential customers, thereby leading to both informed and quicker purchasing decisions. Investing in AI technologies will fast-track understanding and adaptability, thus enabling sales teams to implement new strategies quickly and more effectively. Likewise, "test piloting" sales strategies is an essential aspect of an agile sales approach, with a "test and learn" philosophy built in from the ground up.

Step 7
Monitor progress and adjust as needed

Your sales team should be continuously assessing the outcomes of their actions, using relevant KPIs to gauge effectiveness. An organization must continuously refine and update its customer segmentation model to mirror evolving market trends and customer behaviors, ensuring precise, timely, and actionable insights.

Measure the impact and assess/reassess the effectiveness of your overall agile sales model based on what works. Your sales force will have more success if they can leverage real-time data to identify high-conversion potential customers, and then tailor their sales messaging based on the most up-to-date date information that addresses customer concerns and provides accurate and timely solutions. Next, they must assess the outcomes of their actions on an ongoing basis, using relevant KPIs to gauge effectiveness. By analyzing these results, sales teams can iterate on the sales model, fine-tune their strategies, and incorporate lessons learned to boost sales performance.

Sales agility is a necessity, not a nice-to-have

An agile sales transformation embraces the principles of continuous improvement, experimentation, and adaptability to accommodate evolving market dynamics and customer demands. By relying on a strong customer segmentation model, agile sales processes tailored to customer needs, and data-driven insights, your organization can develop a streamlined, agile framework that supports growth and efficiency.

What's more, this approach will also help you develop executive support and cross-functional collaboration with regard to the agile sales program. By following the steps set out in this paper, your sales organization can be prepared to embark on an agile sales transformation journey and position itself for secure, long-term success.

How KPMG can help you

Whether transforming a sales organization, designing go-to-market strategies, or re-evaluating your current approach, KPMG brings the right skills, people, and technology to the many challenges facing business today.

Our team of customer advisory specialists can help you understand what your customers need—and transform the way your organization delivers value. Combining business experience with functional acumen, we provide you with deep economic analysis, robust customer insights, and market intelligence and strategic business direction.
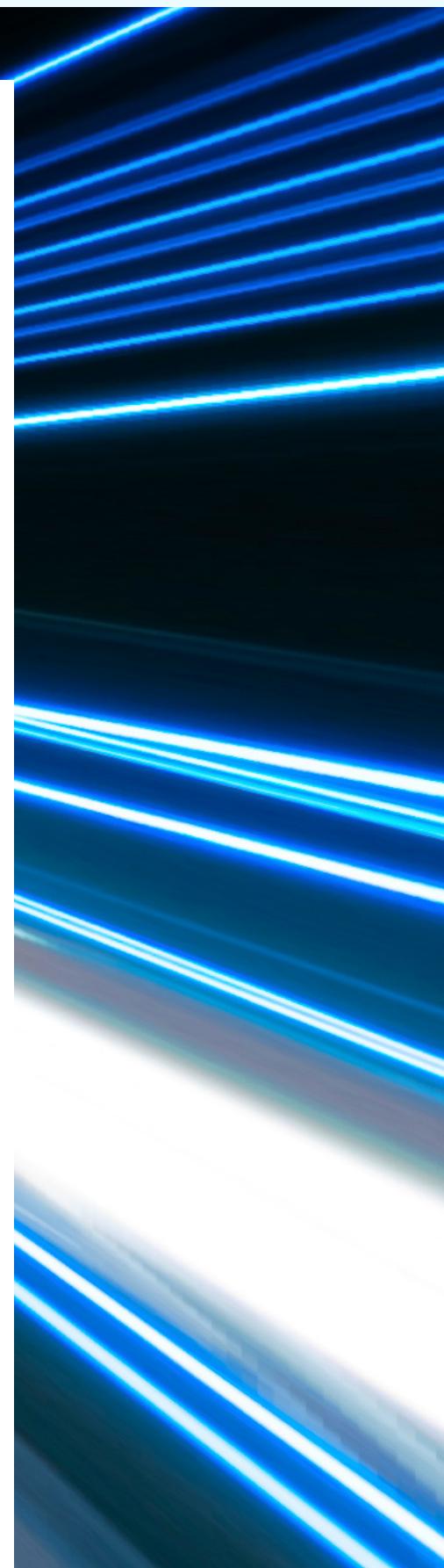
Connect with us

For more information on how we can help you with your sales transformation initiatives, including details on how KPMG can help in designing and implementing a sales agility program for your organization, please visit our website or contact one of our experienced professionals below:

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KPMG Customer Advisory helps some of the world's leading marketing, sales, and service professionals make the right investments that deliver meaningful, sustained growth. At every step, we deliver insights that help you make decisions with precision and confidence. Together, we'll turn opportunities into tangible, transformative results. Let's start the conversation.

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