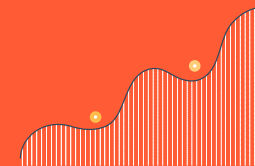
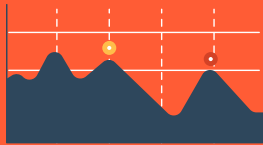


# 2023 Sales Trends Report

Strategies, Data, + Insights for Global Leaders

HubSpot × aircall



# Foreword



**Christian Kinnear**

Chief Sales Officer, HubSpot

Sales organizations at leading companies around the world are committed to growing better — and today, that means focusing more on how you sell than what you sell. The highest performing sales teams prioritize building rapport with prospects, listening to their challenges, and developing meaningful relationships. The fundamentals have remained the same; like Zig Ziglar said, “Stop selling. Start helping.” But the way that we do this has changed quite a bit.

In a competitive and rapidly changing environment, how you engage with prospects and customers is why you win or lose business. Businesses with cobbled tech platforms are experiencing a [“crisis of disconnection,”](#) and seeking out new ways to align teams, data, and the customer experience.

Buyers are committed to sharing their experiences and learning from their peers’ experiences, and third-party analyses like those from G2 and Gartner are becoming increasingly more integral to the buyer’s journey.

At HubSpot, we’re honored to have been identified as Leaders in the [2022 Gartner Magic Quadrant for Marketing Automation Platforms](#) and the [G2 Grid for the Best CRM Software in 2022](#). This recognition is compelling to our audiences because it’s based on their reviews and experiences with our tools. Over the past 10+ years we’ve been listening to our customers and building our platform to help them grow better, and their successes have, in turn, helped us grow and scale.

The deepest and most durable relationships take time and commitment, that's why delighting customers is more important than closing the initial deal and moving on. We've learned that the customer journey starts with the sale, and companies that deliver better customer experiences at every phase create brand promoters who [fuel the Flywheel](#).

Find ways to beautifully blend technology into your marketing and sales processes to answer questions, guide the user, and provide resources. But make it extremely easy to get in touch with a human being, and the right human being, or risk losing a prospect or a paying customer. Digital technology is necessary for a top-notch customer experience, since customer expectations for personalization and an intuitive user experience are higher than ever.

With brand new data from over 1,000 sales leaders across different countries, markets, and audiences, we've put together a comprehensive analysis of sales trends and strategies to help you succeed in the year ahead. We've also gathered insights from trusted sales leaders to show how to put the data into practice and see measurable results.

I hope the data and takeaways from this report help you lead your team confidently in 2023.

# Table of Contents



Foreword .....	2
Introduction .....	5
CHAPTER 1: .....	8
Top 6 Sales Goals for 2023	
CHAPTER 2: .....	23
Top Sales Challenges (and Tips to Solve Them)	
CHAPTER 3: .....	37
How to Get the Most Value from Phone Calls as a Sales Channel with Aircall	
CHAPTER 4: .....	41
Sales Metrics to Track in 2023	

CHAPTER 5: .....	43
Lead Generation Strategy	
CHAPTER 6: .....	46
Year-Over-Year Comparison of Sales Performance in 2021 vs. 2022	
CHAPTER 7: .....	49
Sales Culture	
CHAPTER 8: .....	53
Trends from Effective Salespeople	
Closing .....	55





# Introduction

## The Evolving Hybrid Sales Landscape

Sales has evolved over the past several years. All industries have seen a shift from in-person selling and networking to virtual and hybrid strategies. Automation and technology have redefined sales efficiency, and new sales intelligence apps join the marketplace weekly. During a time of economic uncertainty, efficiency is top of mind for sales leaders, who are experiencing budget cuts and tighter margins.

Today, we've seen that sales managers measure productivity based on CRM usage. With longer sales cycles and more relationship-building prior to closing deals, CRMs have proven critical to keeping track of prospects and meeting their needs at scale, while keeping operational costs down.

Younger generations are gaining decision-making power and growing in the sales force, and they communicate much differently than previous generations. They've grown up as digital natives, and many have never worked in an office environment. Fundamental sales strategies remain effective, but with new tweaks to fit into today's tech stack.

## New Survey Data + Insights from 1,000+ Sales Professionals

HubSpot partnered with Aircall to survey 1,000+ global sales professionals around the world to learn what sales channels and strategies are working, how sales teams can hit their targets in 2023, where to find qualified leads, and more.

The data revealed that the buyer's journey continues to grow and change, and top sellers have adapted to meet new (higher) customer expectations.





Consumers expect hyper-localized content, targeted communication via a variety of multimedia touchpoints and channels, and strategic consultation at every stage. And with an exponential rise in the volume of virtual messaging, the top challenge in sales in 2022 is standing out from the competition.

With a looming recession, budgets and headcounts are shrinking across departments — buyers want to see how every decision they make will impact revenue, and want to feel confident that they will have dedicated support once they sign on with a new solution.

In this report, we'll review high-level trends in B2B and B2C sales, provide executive insights from leaders at top companies, and cover the strategies and tools that sales leaders can use in 2023 to reach their goals.

## **Report Methodology**

HubSpot surveyed 1,000+ sales professionals via online survey in July-August 2022 from B2B and B2C organizations in the U.S., UK, Japan, Canada, Australia, France, and Germany.





## Powerful all-in-one CRM and sales software for teams

Tools, data, and automation that help eliminate friction from the selling process.

- Find new opportunities to connect with prospects
- Build trust and establish lasting relationships
- Automate administrative tasks, giving reps time to connect
- Access detailed revenue analytics and forecasting

**Get a Sales Demo**



## The phone solution for savvy sales teams

Foster productive—yet personalized—selling, at scale.

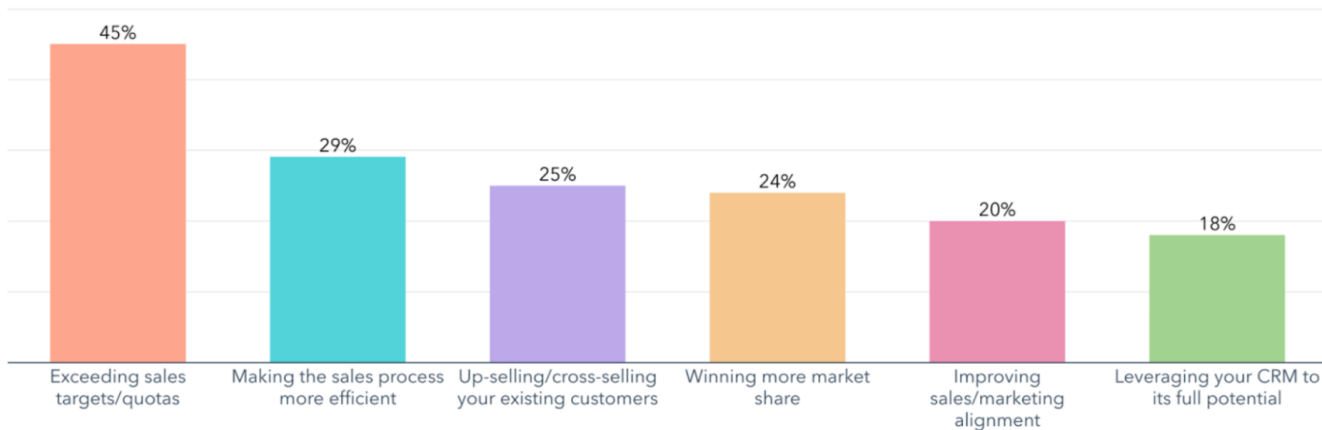
- Boost sales team productivity
- Integrate with HubSpot and other leading CRMs
- Track sales performance
- Onboard new teammates more effectively

**Try Aircall for Sales**

# Chapter 1: Top 6 Sales Goals for 2023

2021 was a surprising year for sales — following the pandemic, a global shutdown, and a complete transformation in the way that we work and live, 42% of sales professionals still managed to exceed their goals. In 2022, 41% report exceeding their goals, despite challenges like a crowded solutions landscape, fewer high-quality leads, and difficulty finding and reaching qualified prospects.

What are your top sales goals this year (top 6)?



For the year ahead, the main sales goal leaders hope to achieve builds off of the momentum of the past few years — 45% of sales leaders want to exceed sales targets and quotas. But they plan to reach these goals in new ways. Sales teams are leveraging technology, focusing on demonstrating value, and building their own marketing and media channels to increase market share.

**One in four sales leaders identified their main goal for 2023 as up-selling or cross-selling existing customers.** Selling to existing customers has lower acquisition costs, and happy customers can drive significant business growth when they become brand promoters.

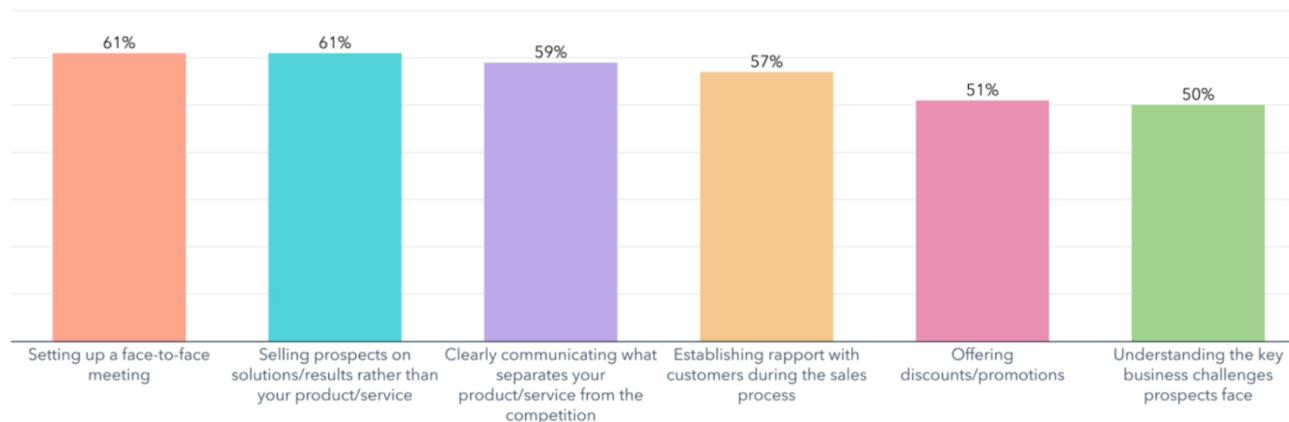
Other high priority goals in 2023 include making the sales process more efficient, leveraging CRMs to their full potential, improving sales and marketing alignment, and winning more market share in a competitive online space. Today's sellers need to build trust in new ways, and it's harder to reach executives and decision makers with the growing majority of leaders working remotely. Technology like CRM platforms and sales intelligence tools are helping uncover new opportunities and guide more effective conversations.

## Goal 1: Exceeding Sales Targets and Quotas

The top sales goal across B2B and B2C teams is to exceed sales targets and monthly or yearly quotas. What's changing in this area is the strategies that are successful in converting leads into customers. In 2023, expect sales tactics to become even more specialized by audience, niche, phase of the buyer's research journey, and sales intelligence information.

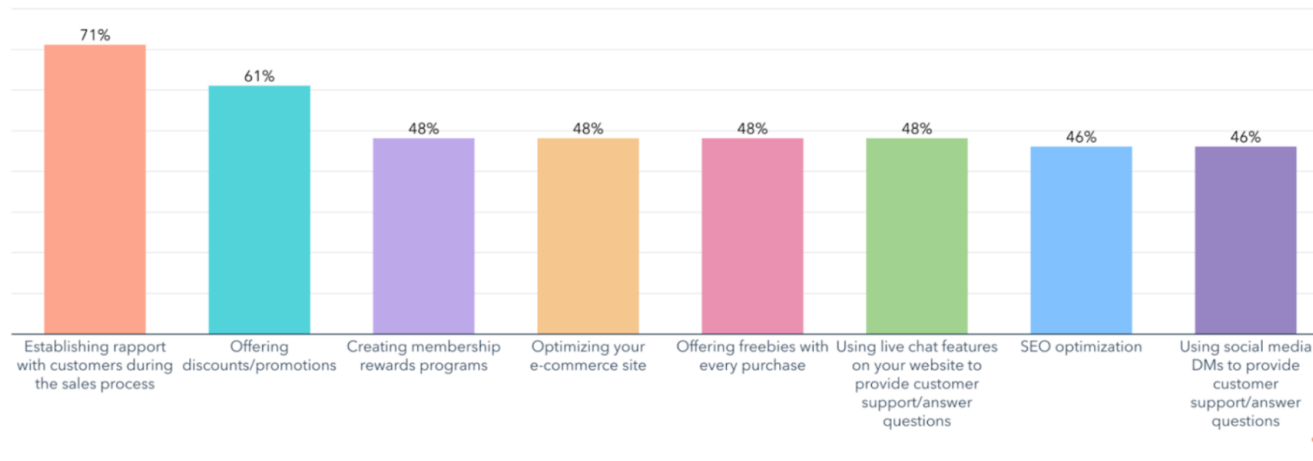
For B2B sellers, the most effective sales strategies for winning new customers are setting up face-to-face meetings, highlighting solutions to customer problems, and establishing competitive advantages in the market.

Which B2B sales strategies are most effective for selling to new customers (top 6)?



On the B2C side, sellers have found success establishing rapport during the sales process, offering discounts and promotions, creating membership rewards programs, and optimizing their e-commerce sites.

Which B2C sales strategies are most effective for selling to new customers (top 8)?



“Prospects are less interested in ‘seeing how it works’ and more interested in making sure you understand their needs, have a comprehensive idea of their requirements, and that the product will work.”

[Dan Tyre, Sales Director, HubSpot](#)

## Goal 2: Making the Sales Process More Efficient

As customer expectations rise, sales representatives have to add even more to their discovery checklists, which adds time and administrative tasks to their daily schedule. Almost one third (29%) of sales professionals' top goal for 2023 is to make their sales process more efficient. And the most popular tools to improve sales efficiency are Troops, Zoho, LeadIQ, LinkedIn Sales Navigator, and the HubSpot CRM.

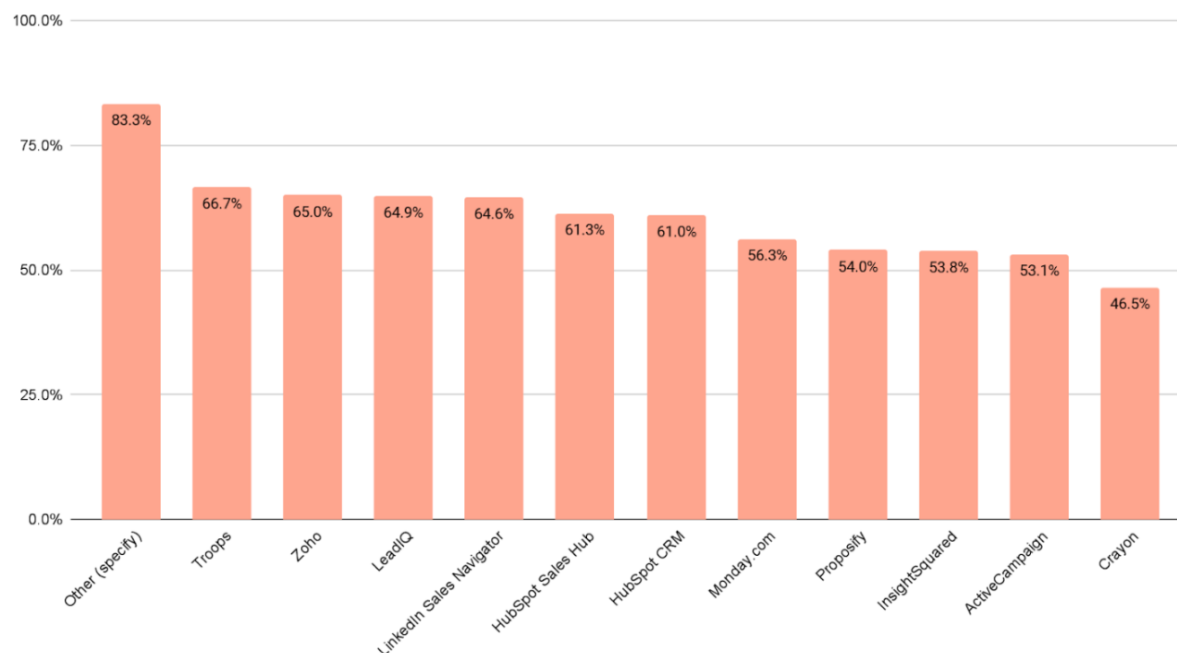
More than one in five sales professionals reports that the **top reason prospects back out of deals is the length of the sales process**, so any steps to speed up approvals and timelines helps you stand out and increases the likelihood of closing the deal.

**Almost one-third of sales professionals' top goal for 2023** is to make their sales process more efficient.

“Things like email templates, call recording functionality, and calendar management links are new features that are taking sales productivity to the next level.”

Dean Moothart, Director of Client Solutions, LeadG2

Which of the tools you use helps you the most with productivity? (Top 12)



### Goal 3: Prioritizing Existing Customers

More than three-quarters of sales professionals (76%) report that 10%+ of their company revenue comes from upselling. And 68% say that 10%+ of total company revenue comes from cross-selling. Prioritizing existing customers impacts both direct revenue on upsells and cross-sells, and also influenced revenue.

The three most effective opportunities for up-selling existing customers are:

- 01** After successfully meeting your client's goal
- 02** When you've identified issues with your client's strategy that your service or product can help solve
- 03** When you are setting goals with your client



## Upselling and Cross-Selling Strategies for Existing Customers

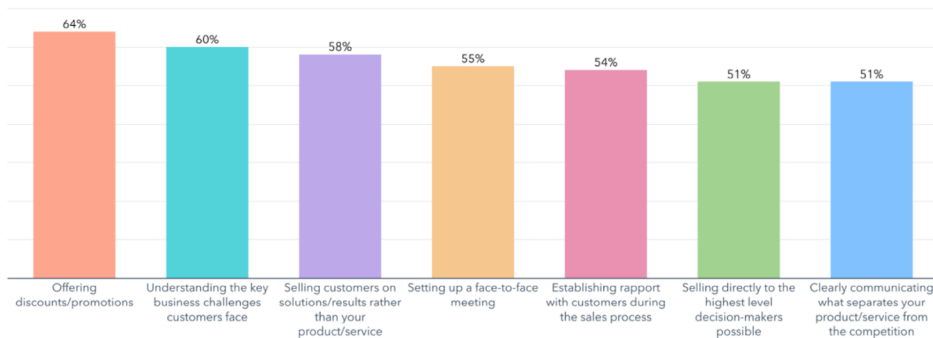
Upselling and cross-selling requires a deep understanding of your customers, their goals, and their actions. People give business to people they trust and enjoy working with, and they have more choices than ever before.



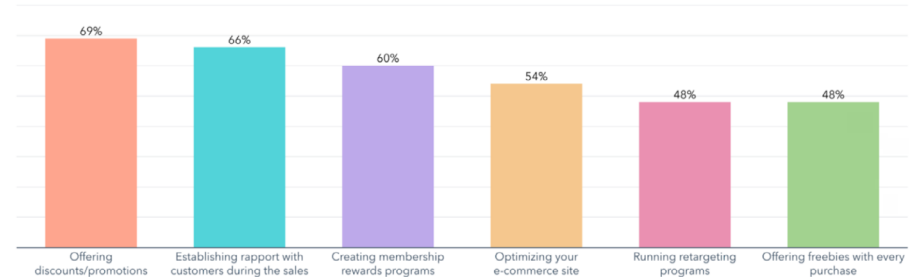
In the [LinkedIn Global State of Sales Report](#), almost half (46%) of sales representatives said their biggest challenge was incomplete data. Upselling and cross-selling rely on accurate data and automation, which support an exceptional customer experience. Without a foundation of a solid relationship with your customers, discounts and promotions, which are the most effective sales strategy for existing B2B and B2C customers, will only go so far and last so long.

Using sales intelligence tools, understanding industry trends and nuances, and providing thoughtful suggestions to help customers hit their goals are some of the top ways sales teams are adding value and successfully selling to current B2B and B2C customers.

Which B2B sales strategies are most effective for selling to existing customers (top 7)?



Which B2C sales strategies are most effective for selling to existing customers (top 6)?



“When it comes to B2B sales, there are multiple decision makers at the table. And these decision makers have done their research online before ever jumping onto that first demo. Competitive intelligence solutions are enabling sales teams and giving them insights in real time so they can confidently know when to say, “Only with my solution can you get...” And that’s what wins more deals,”

says [John Judge, SVP of Sales at Crayon.](#)

## Goal 4: Winning More Market Share

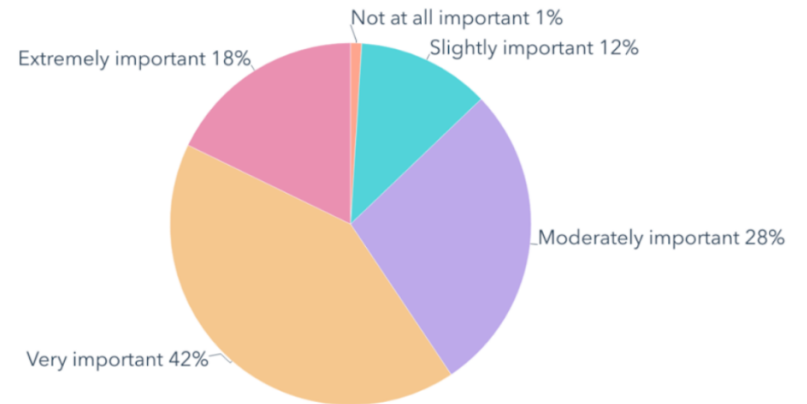
Six in 10 sales leaders feel that having dedicated sales enablement support is ‘very important’ or ‘extremely important’ to making sales. And salespeople at companies with dedicated enablement teams perform better and are more likely to exceed their goals.

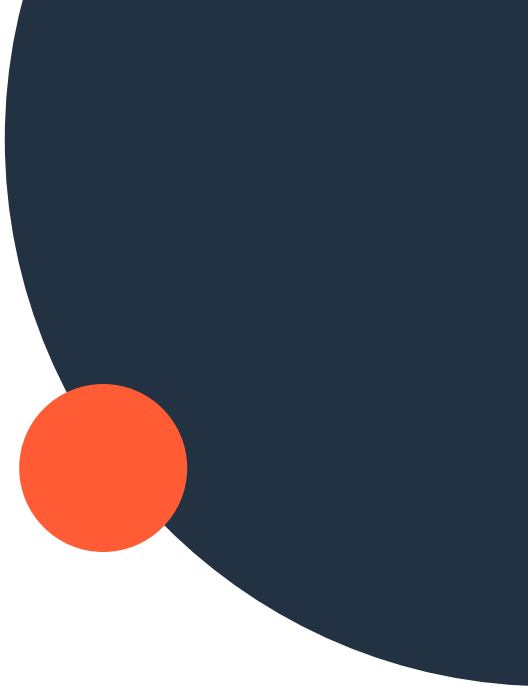
When sales enablement and marketing teams establish a wider presence in the market, it makes it easier for sales teams to close deals and focus on customer challenges, rather than having to start from square one with laying a foundation of trust and brand recognition.

In 2023, sales enablement teams should focus on creating and generating:

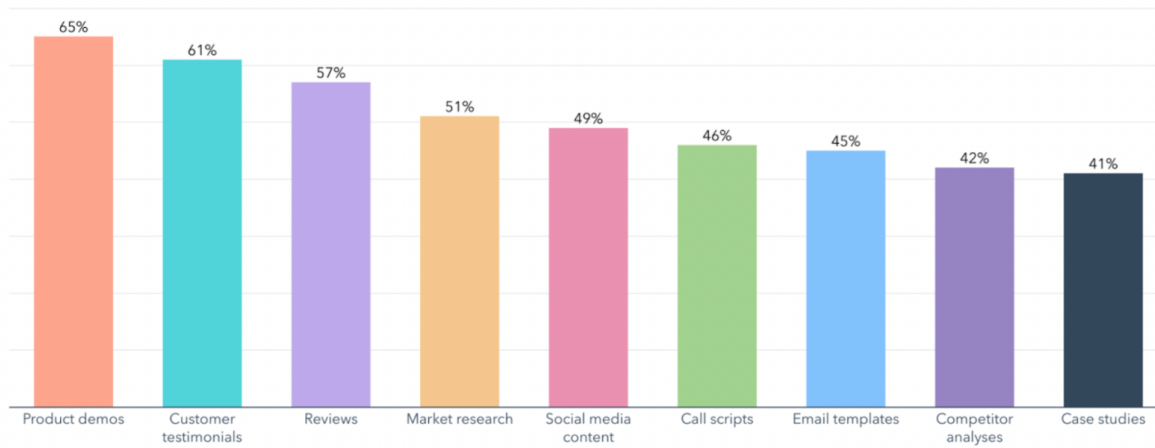
- Product demos based on use cases
- Up-to-date customer testimonials and case studies
- Reviews
- Current market research reports
- Shareable social media content

How important is sales enablement content to making a sale?



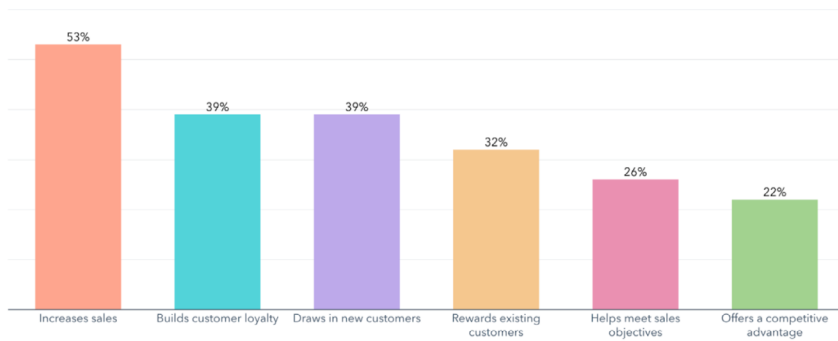


What types of sales enablement content is most effective at helping salespeople win deals (top 9)?

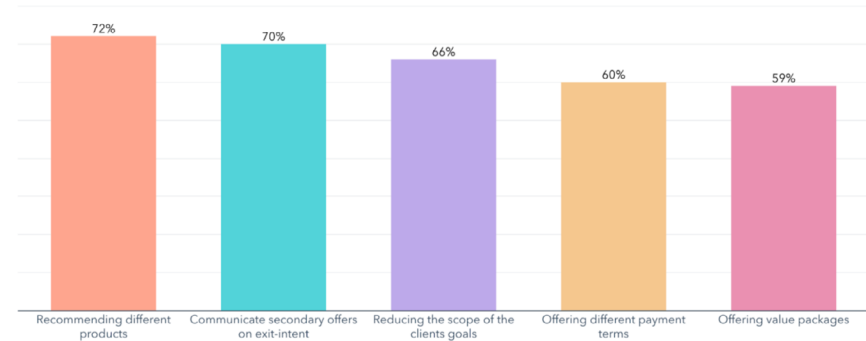


Other ways that sales teams are winning more market share are offering discounts and promotions with industry partners, and down-selling to capture leads at an earlier growth stage than the ideal target audience.

What are the biggest benefits of offering discounts/promotions (top 6)?



Which down-selling strategies are most effective?

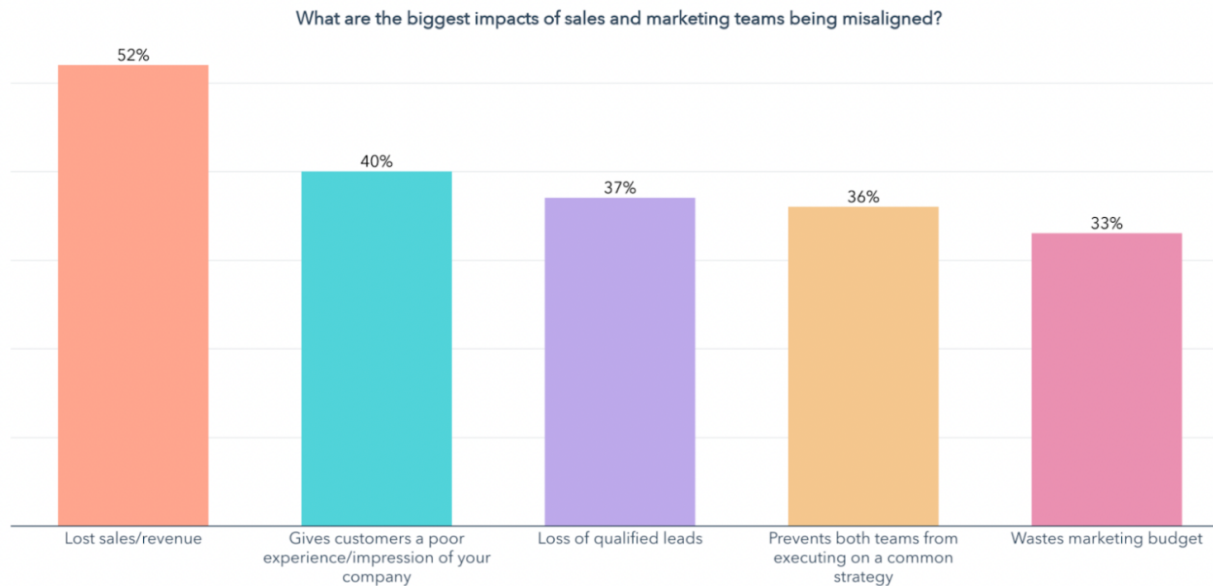


[Take the HubSpot Academy Sales Enablement Training Course + Get Certified in Sales Enablement](#)

## Goal 5: Improving Sales + Marketing Alignment

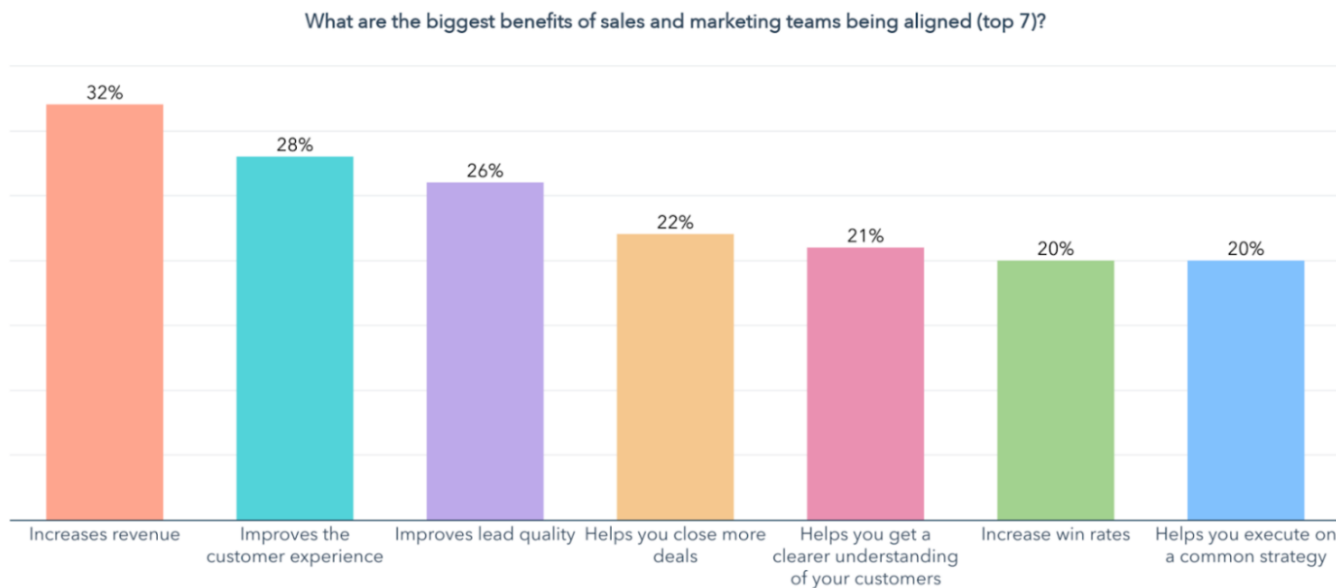
When sales and marketing teams are misaligned, it leads to missed sales and revenue, lost qualified leads, and a poor impression of the company as a whole. More than half of sales leaders (52%) say that misaligned sales and marketing teams have cost them revenue, and more than one-third (36%) report that it prevents both teams from succeeding. A third of sales leaders (33%) also find that when sales and marketing aren't aligned it wastes marketing budget.

In 2022, **one in five sales professionals feels that sales and marketing teams aren't very aligned, or not aligned at all.**



When sales and marketing teams are aligned, it

- a) increases revenue,**
- b) improves the customer experience,**
- c) increases lead quality, and d) helps teams close more deals, along with more benefits to both teams.**



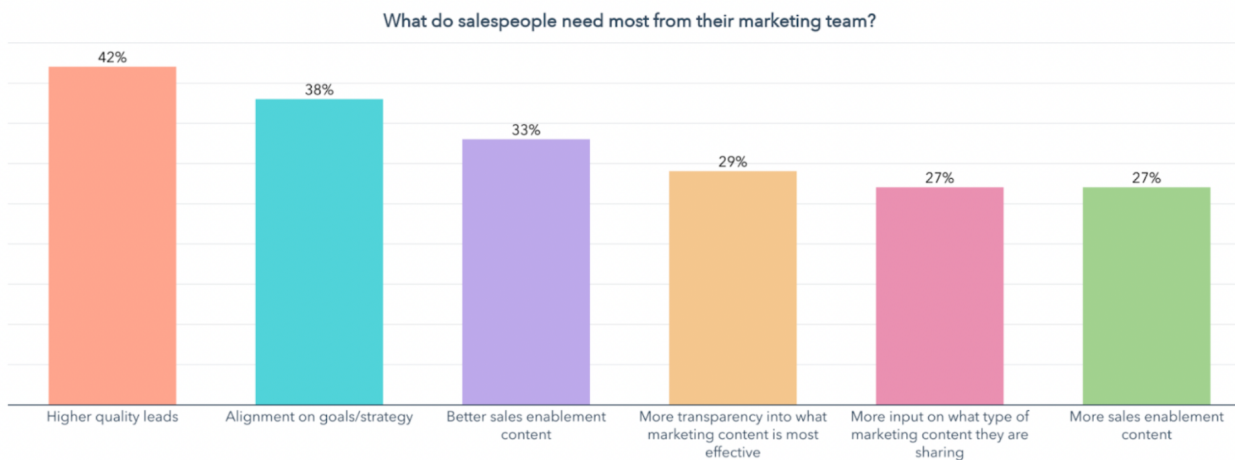
## How Sales and Marketing Teams Can Work Better, Together

When marketing and sales teams aren't on the same page, it wastes budget, and creates frustration for both sides. For example, if marketing spends a quarter of their budget on a campaign that generates low-quality leads, everyone suffers — sales representatives spend time calling unqualified prospects, the marketing team sees low engagement, and no one hits their targets.

When these teams work together, they can help each other grow better. The biggest barriers to sales and marketing alignment, from a sales perspective, are:

- 01 Lack of effective communication between teams (38%)
- 02 Lack of alignment on goals/strategies (30%)
- 03 Lack of input from sales on marketing content (27%)
- 04 Sales and marketing teams use different tools (26%)
- 05 Difficulty sharing data between sales and marketing teams (26%)

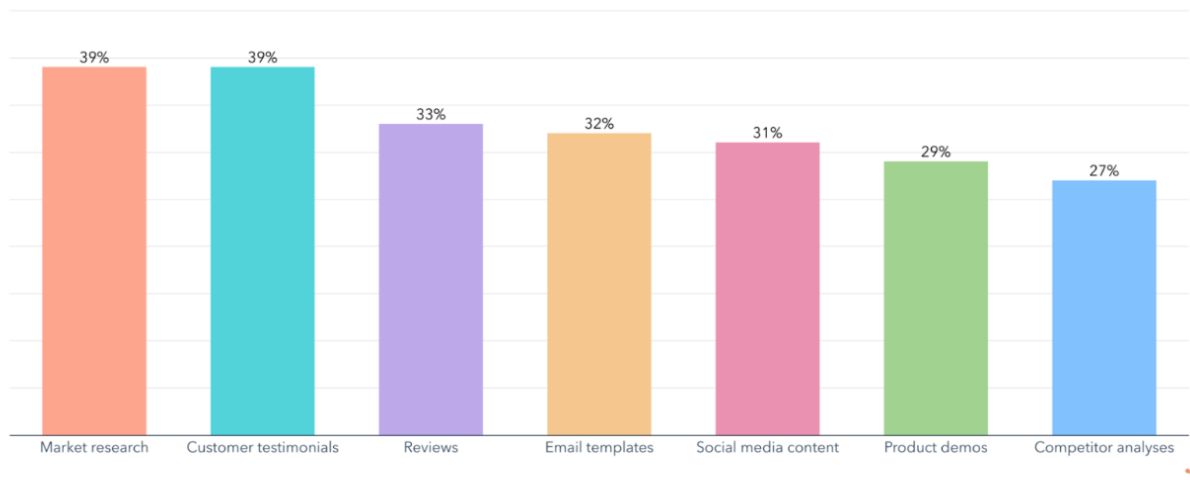
The first step towards bringing sales and marketing together is establishing one source of truth in terms of contact profiles and data. When teams can accurately track the success of marketing initiatives all the way down to sales and brand ambassadors, they can more confidently report on ROI and make informed decisions about marketing campaigns.



## Sales Enablement Content to Create + Generate in 2023

- 01 Market research reports
- 02 Customer testimonials + case studies
- 03 Reviews
- 04 Email templates
- 05 Social media content
- 06 Product demos
- 07 Competitor analyses

What kinds of sales enablement content do salespeople use (top 7)?





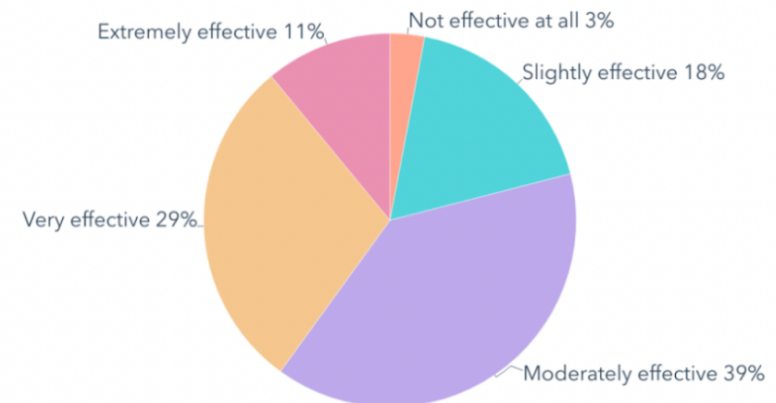
## Goal 6: Leveraging Your CRM to Its Fullest Potential

Two of the top five obstacles to sales and marketing alignment are a) having different tools, and 2) difficulty sharing data between teams. For teams hoping to better leverage their CRM, the first step is to make sure it's connected to your marketing and revenue optimization tools. The more teams using a shared data source and contact management system, the more connected the user experience is

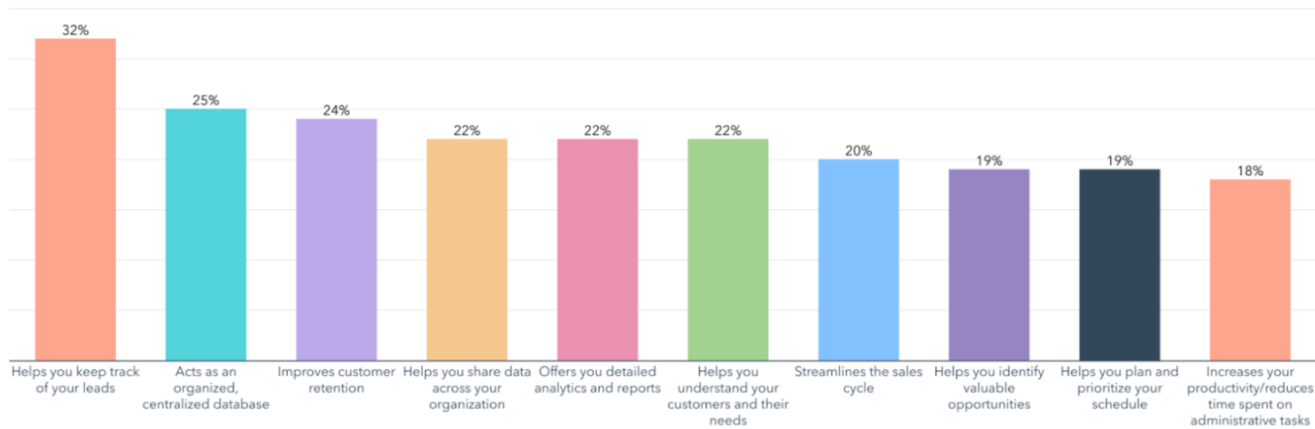
Another underrated consideration is **supporting the tools your teams actually use**. Regularly analyze user data in the sales tools that you invest in to find out what the top performers use the most and which tools are connected to the highest revenue customers. Survey sales teams to learn what tools they are using to help them find new prospects, do research, conduct outreach, follow up with leads, and manage their pipeline — and if any of these tools are outside of your team's tech stack, find a replacement that integrates with your systems.

**40%** of sales professionals feel that their CRM is 'very effective' or 'extremely effective' at improving sales + marketing alignment.

How effective is your CRM at improving sales/marketing alignment?



What are the biggest benefits of using a CRM in your sales process (top 10)?



“To get the full benefit of your tech stack, it has to feel natural to lean on it. If half of your marketing, sales, and service teams don’t leverage these tools, then the data isn’t accurate and the ROI can’t be properly measured.”

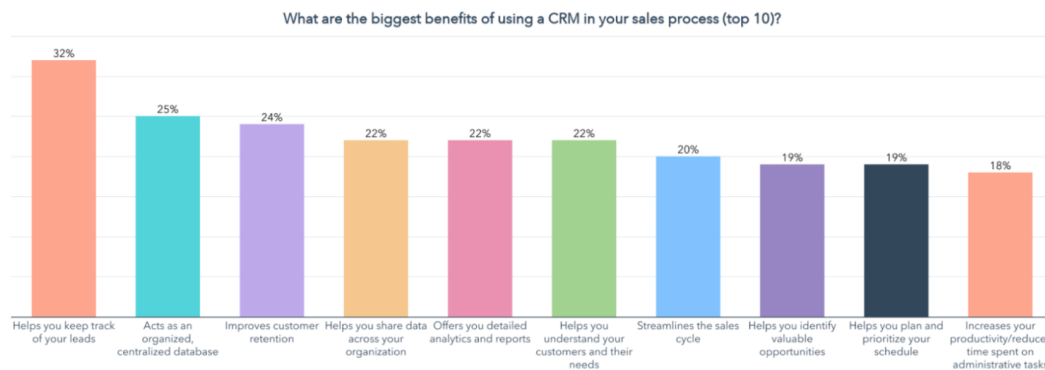
[Tracey Quinn, Associate Inbound Growth Specialist, HubSpot](#)

# Chapter 2: Top Sales Challenges

## (and Tips to Solve Them)

In 2022, the top sales challenge is standing out from the competition. Other top challenges include meeting quotas, getting in touch with decision makers, and lead quality. For sales managers, consider your team quotas for 2023, and how frequently you revisit them. Due to market shifts, the same expectations from previous years may be harder to hit this year.

To address sales challenges like finding quality leads, getting in touch with decision makers, keeping prospects engaged, and building rapport, salespeople should consider building out a personal branding strategy. The #1 channel for getting in touch with decision makers is LinkedIn, making it a great place to share useful content about the industry. [Video content is one of the most popular forms of marketing](#), and sees incredible engagement on LinkedIn, Facebook, and YouTube. When prospects develop a relationship with you via social media first, they're more likely to feel ready to purchase from you when the time is right.



## Challenge 1: Standing Out From the Competition

To stand out against the competition, prepare to exceed prospects' expectations at every interaction. The standard for software and tech companies today is personalized email marketing, educational content and events, and experienced reps available for in-depth exploratory calls. So in order to rise above the crowd, you need to be one step ahead of the already high standards in helpful, inbound selling.

- 01 Read user guides or use tutorials to learn your CRM and sales software inside and out.
- 02 Gather sales enablement materials like industry-specific demos, case studies, reviews, testimonials, and analytics tools or reports.
- 03 Keep up with industry news, trends, and reports to help prospects guide strategy and show the potential ROI to their supervisors or other decision makers.
- 04 Set up alerts and automation to help you follow up with prospects at the right time and provide valuable resources.

“With the sheer number of competitors offering any specific SaaS solution, running a strong sales process is more important than ever. When sales reps push for a close, without having executive buy-in and a clear ROI, more deals will be lost to ‘no decision’ and timelines will push.”

Jayme Manos, Senior Manager, Enterprise Sales, HubSpot

## Challenge 2: Meeting Quotas

Setting and meeting sales quotas in 2023 will both be harder than in previous years. Nearly [three-quarters of major advertisers report that the economic downturn is impacting their 2023 budget decisions](#), and 30% are cutting ad budgets. Using this as a preview of the marketing space at large, salespeople should expect prospects to be careful with their spend and deeply consider purchases in the coming year.

To meet quotas and convert leads, **the most effective strategy sales representatives can use is making phone calls** — both for those selling remotely, and overall. Two thirds of salespeople also use discounts and promotions, and more than half report that they increase sales. The most popular promotion among sellers is bundling a suite of products, followed by free trials.

### Hear from Sales Leaders

“To make sure I meet and exceed my monthly quota, I take the time to understand the prospect’s timeline and if there are any hidden parts of the process (this usually includes the legal team or other stakeholders), so I can plan and get ahead of it. Beyond that, I always make sure my calendar is as open as possible so I’m available to hop on calls and can reply to client emails as quickly as possible so they have the answers they need to make decisions. Finally, I make sure to only take meetings with prospects and clients that I think are most likely to find value from Aircall.”

[Elizabeth Beggs, Strategic Account Executive, Aircall](#)

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“A solid sales trend I see in 2022 is the utilization of a multi-touch connection process that absolutely includes a ‘warm call’ on the telephone that can be a first step in starting a sales conversation.”

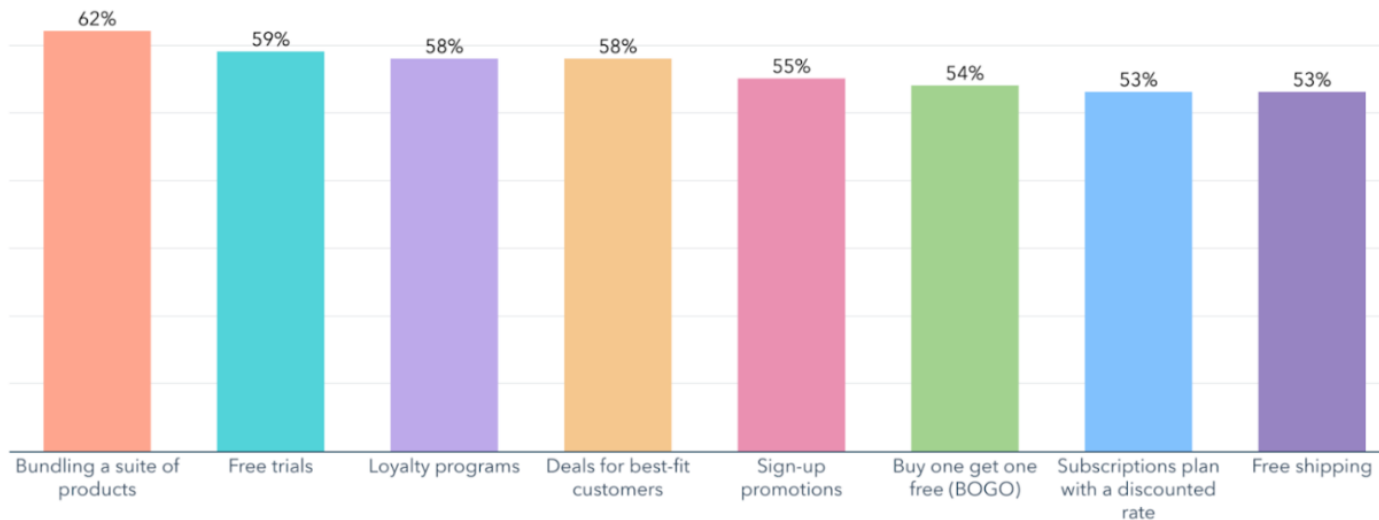
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[Dan Tyre, Sales Director, HubSpot](#)

### ★ Leadership tip:

16% of salespeople believe that **unrealistic quotas are one of the top reasons for turnover in sales roles**. Regularly evaluate your team quotas and check in with reps on how they’re feeling ahead of the end of month or end of quarter.

What are the most effective discounts/promotions for converting new customers (top 8)?



### Challenge 3: Getting in Direct Contact with Decision-Makers

In 2023, 67% of sales representatives will work under a hybrid or fully remote basis, and globally, almost [70% of professionals work remotely](#). Industry events have largely shifted to virtual and hybrid formats, and many leaders and decision makers have physically moved to new locations farther away from their HQ.

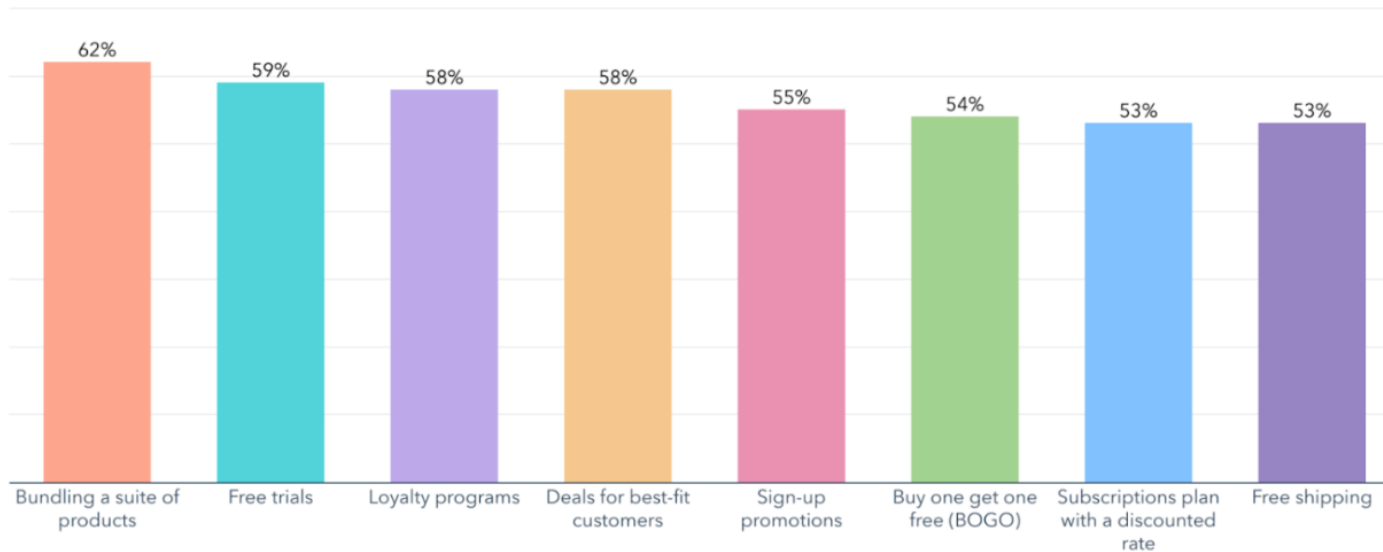
If they're not already, salespeople need to get comfortable with virtual networking and establishing their own presence on social media. **Almost three quarters of sales professionals say that LinkedIn is the most effective platform** for researching prospects.

#### Hear from Sales Leaders

“When it comes to getting to the right decision maker, get straight to the point. In my experience, a simple, direct question leads to a simple, direct answer. Of course, sometimes that answer is no, but asking things in a long convoluted way might cause confusion or distrust about intentions on the prospect's side. Overall I have seen a lot more success with one or two-line emails than with essays.”

[Louise Ryan, Business Development Representative, Aircall](#)

What are the most effective discounts/promotions for converting new customers (top 8)?



#### Challenge 4: Lack of High-Quality Leads

To address lead quality issues, the first place to look is sales and marketing alignment. It's important for sales and marketing teams to share the same understanding of the [ideal customer profile](#) or [buyer persona](#), and regularly review what this means. Develop and update these assets based on sales data, lifetime value, and which customers turn into promoters.

After the target customer has been identified, sales teams use tools like LinkedIn Sales Navigator, HubSpot Sales Hub, LeadIQ, and others to find and engage with prospects at the right time.



## Hear from Sales Leaders

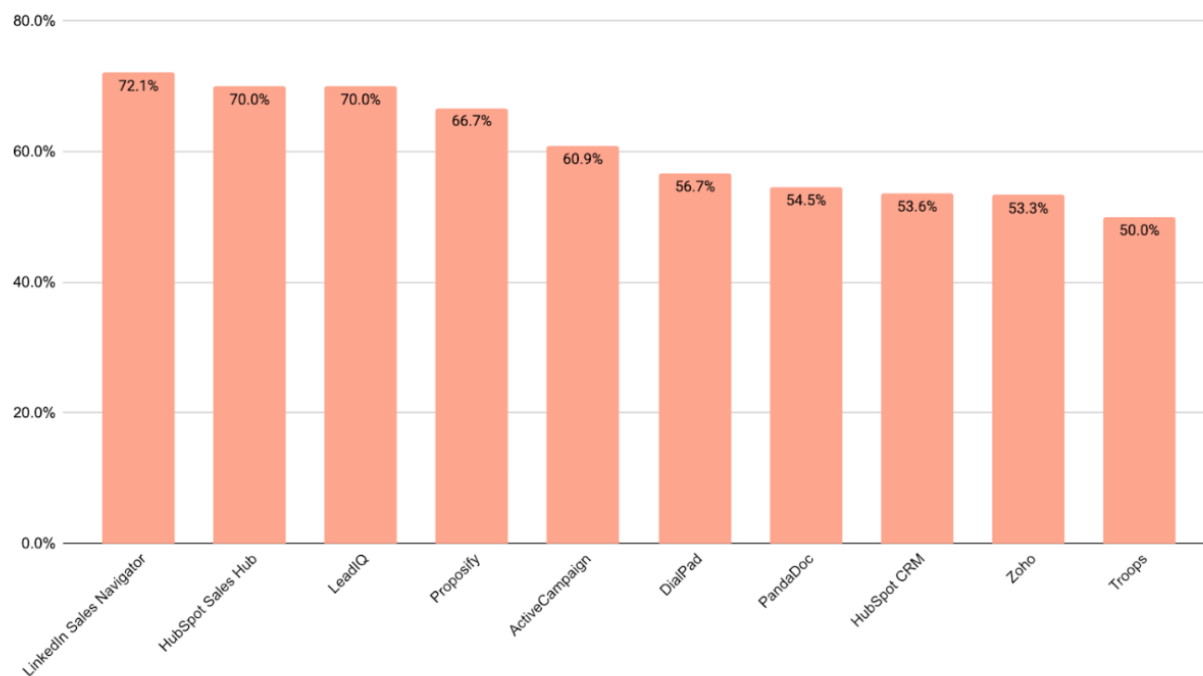
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“I see it as an opportunity to get more creative with my outreach strategy. Believe it or not, there are warm leads everywhere. Whether it be on LinkedIn, review sites, etc., you just have to find them. Having that hunting mentality is critical because there is always a business out there that needs your product/service but you’re going to have to put in that little extra work to find them when warm leads lack.”

”

[Chris Butera, Business Development Representative, Aircall](#)

Which tools are most effective at helping you get leads? (Top 10)



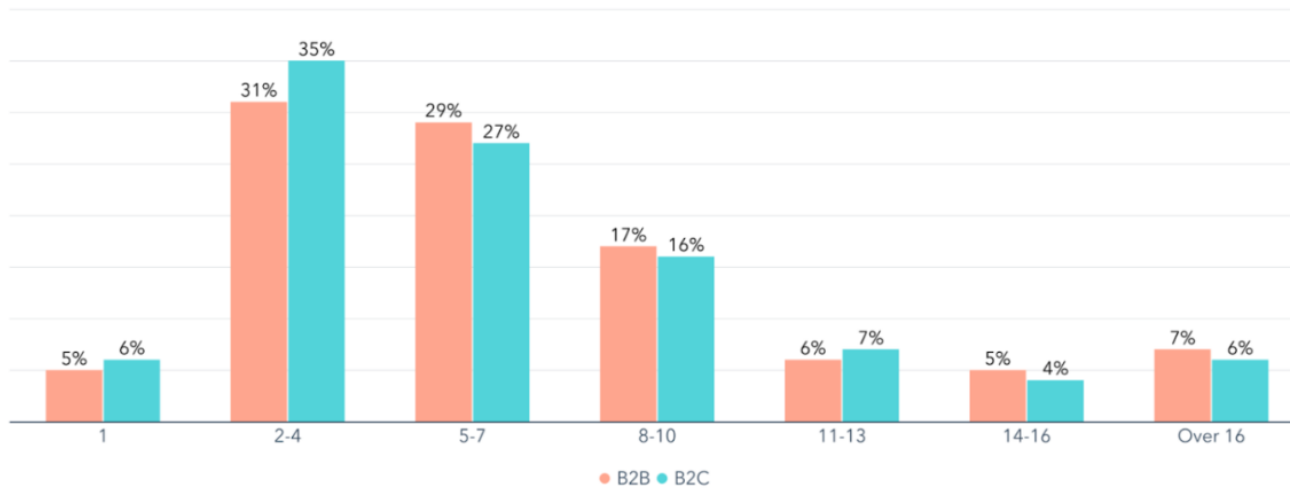
## Challenge 5: Keeping Prospects Engaged Throughout the Sales Process

To maintain a prospect's interest throughout the sales process, which can be lengthy depending on the scale of the software package or service, you need to understand your buyer in terms of the bigger picture context.

- What are their goals?
- What is their busy season?
- How has their industry been impacted by the staffing shortage?
- Are companies in their industry going through layoffs?
- How do they prefer to communicate?
- What metrics do they report to their manager?

During the B2B and B2C sales processes, sales representatives most frequently communicate with prospects two to seven separate times, which adds up when you consider that most have dozens of prospects they're working with at a given time. Using automated sales management tools and a CRM that adds lead intelligence and logs communications with prospects (like phone calls, emails, and actions) can help sales teams manage the hundreds of data points they need to use to successfully bring in new customers.

How many separate communications do salespeople have with a prospect throughout the sales process?



## Hear from Sales Leaders

“I keep my prospects engaged throughout the sales process by making sure I make it all about them. I like to ask questions to really understand where they are as a business and what they’re hoping to accomplish with solutions like Aircall and HubSpot, and then I assure them that I’m here to help. I always inform them that I’m working off of their timeline given the information that they share with me.”

[Christell Cherenfant, Account Executive, Aircall](#)

“Keeping prospects engaged throughout the sales process can be challenging for a sales executive. The key here is really understanding your prospect; their business model, growth goals, challenges, and KPIs. This will help you tailor and personalise your communications. Keep bringing relevant new insights, valuable articles, and high-value CTAs. By sharing regular, tailored and insightful content, you’ll ensure a prospect that’s motivated to stay engaged throughout the buyer journey.”

[Crevan O’Malley, Senior Director of EMEA Sales, HubSpot](#)

### **Challenge 6: Difficulty Getting Meetings With Prospects**

Timing is everything. Reach out at the wrong time, you’re a nuisance. Reach out at the right time, and you’re the answer to a prayer. It’s well known in the industry that the best salespeople spend most of their time on calls with prospects listening.

## Hear from Sales Leaders

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“As an Outbound BDR, one of the biggest challenges I face is holding the attention of a prospect if they aren’t ready to commit at that initial conversation. Something I’ve found to contribute to my success is not only to follow up but also to make notes pertaining to that prospect’s specific circumstances. That way, every prospect feels like they are the only one you’re talking to, allowing for that great customer experience right from the get-go.”

”

[Olivia Smith, Business Development Representative, Aircall](#)

“

“Getting in front of the right people can be incredibly challenging for sales executives. The first key way to secure a meeting is to understand your prospect and make sure you’re adding value in each of your communications. By understanding their challenges and goals, you’ll be able to tailor your messaging and make yourself a useful contact. Also, don’t be afraid to stand out from the crowd by testing new channels like video or voice notes to make your contact more personable.”

”

[Alan Slevin, Manager, Business Development UKI, HubSpot](#)

In order to secure meetings with qualified prospects, the best strategy is to listen. And to make it easy to meet with you.

When listening for signals that a prospect is ready to meet, use these questions as a guide:

- Has the prospect viewed the pricing page?
- Have they requested additional pricing information?
- Did they recently download a case study?
- Have they used the chat feature on your website?
- Did they attend an event with your company or a partner?
- Have they asked for recommendations for new products on social media?

Social selling requires a combination of social media savvy and sales tools that can automatically flag key readiness indicators and send automatic alerts.

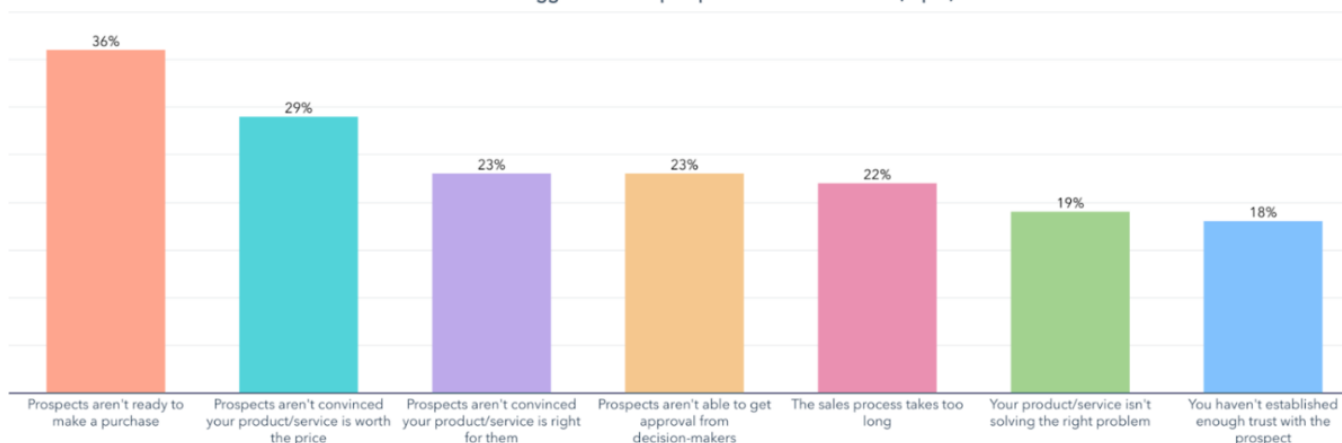
## Get the Sales Playbook to Social Selling

### Why Prospects Back Out of Deals

The **number one reason prospects back out of deals is that they aren't ready to purchase**. Remember — timing is everything. Other key reasons like prospects not being convinced that the product or service is right for them, or that it doesn't solve their problems largely signal a disconnect between the prospect, the messaging, and the solution.

Collect data on why prospects are backing out of deals to find out where the breakdown is happening. Look at the entire process, from initial outreach, to nurturing, to customer marketing and retention. Align sales and marketing teams around the same buyer persona and make sure it's easy for everyone to access up-to-date sales enablement materials.

What are the biggest reasons prospects back out of deals (top 7)?



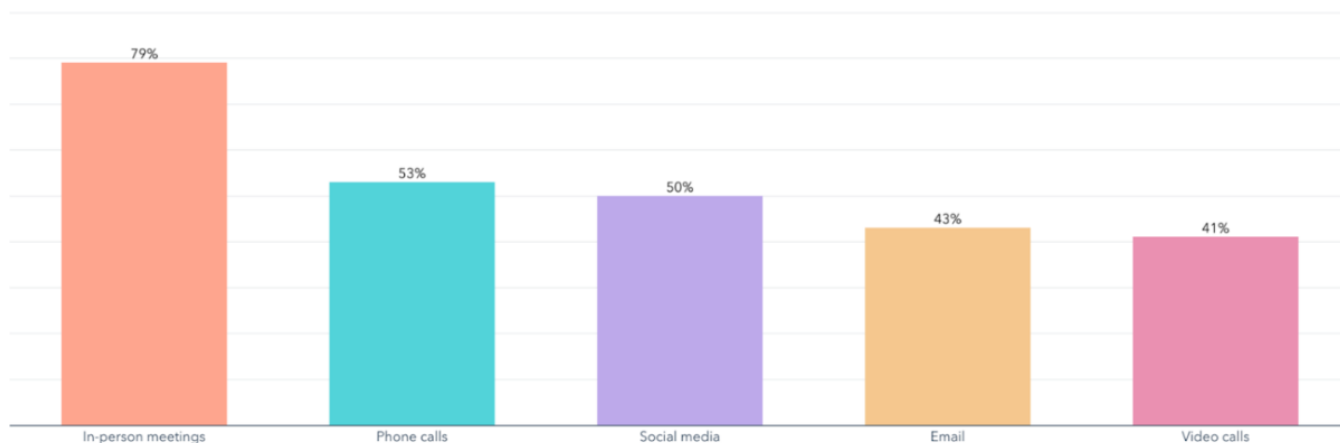
Reasons Prospects Back Out of Deals	Tips to Solve Prospect Challenges
"I'm not ready to make a purchase."	<ul style="list-style-type: none"> <li>• Ask about budget cycles and the decision-making process</li> <li>• Use data to guide the right time to send contracts</li> <li>• Incorporate decision-makers earlier in the sales process</li> </ul>
"I don't think your product/service is worth the price."	<ul style="list-style-type: none"> <li>• Provide case studies for similar sized businesses with ROI details</li> <li>• Down-sell to a freemium version or a trial and let the product sell itself</li> <li>• Use a comparison matrix with competitors</li> </ul>

“I don’t think your product/service is right for us.”	<ul style="list-style-type: none"> <li>• Send case studies from the same industry or use case with data and testimonials</li> <li>• Offer an extended free trial</li> <li>• Show the prospect how your product/service works with their existing tech stack</li> </ul>
“I can’t get approval from my supervisor.”	<ul style="list-style-type: none"> <li>• Adjust buyer personas to leadership and decision makers</li> <li>• Bring decision makers in earlier</li> </ul>
“The sales process is taking too long.”	<ul style="list-style-type: none"> <li>• Automate follow-up tasks and reminders</li> <li>• Bring decision makers in early</li> <li>• Use digital proposal apps that integrate with your CRM</li> </ul>
“Your product/service isn’t solving the right problem.”	<ul style="list-style-type: none"> <li>• Offer an extended product demo</li> <li>• Offer an extended free trial</li> </ul>
“I don’t trust you enough to commit yet.”	<ul style="list-style-type: none"> <li>• Offer an extended free trial</li> <li>• Send case studies or testimonials</li> <li>• Suggest a more flexible pricing plan</li> </ul>



# Chapter 3: How to Get the Most Value from Phone Calls as a Sales Channel with Aircall

What are the most effective sales channels (top 5)?



It's no secret that phone is one of the most successful sales channels, ranking right below in-person meetings and right above social media and email. It's direct, personal, and effective, leading to positive outcomes as you build rapport with prospects and customers alike.

Let's break down a couple of ways you can leverage voice to reach your business goals.

## Use Phone Calls to Keep Track of Customer Data

From a data standpoint, phones can provide essential context to help you keep track of leads throughout the customer journey, especially when you connect your business phone to key business tools like your CRM or help desk.

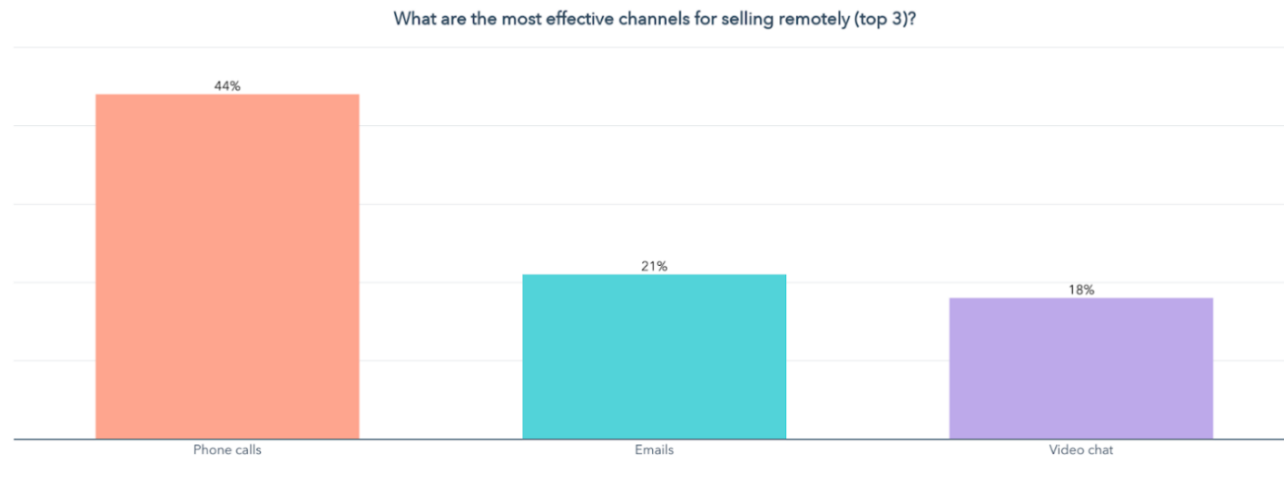
By connecting these tools, you'll be able to quickly access order info, customer details like their name and contact information, and see their interaction history so you can get a sense for the problems they're navigating and how you can help.

For Aircall customer Humanitix, they integrate voice with HubSpot to coach team members and improve their customer experience.

"All recordings are brought into Hubspot, which is really helpful, so when we do need to listen to a call, we can quickly pull up the contact and listen. If we're doing a call feedback session, we'll jump into the call recording within Aircall itself," said Michael Shaskey, Humanitix's Head of Growth.

Beyond call recording, integrations make it easier to focus on what matters most. "Whether tracking communications or linking updates to specific contacts, our work is seamless," said Bree Wright, Head of Client Acquisitions at The Photo Studio.

## Sell Anywhere with Modern Cloud-Based Phone Solutions



Another benefit of investing in a modern business phone is being able to sell no matter where you're located. When it comes to remote selling, 44% of survey respondents ranked phone calls as the most effective way to close deals (21% of respondents preferred email and 18% preferred video chats) since they allow for you to really build relationships with prospects and create a positive and memorable experience.

When you leverage cloud-based phone features like international and local numbers, you're able to expand your global reach and speak to prospects wherever they are (and see major cost savings on international calling in the process).

For Superscript, having the ability to easily scale a remote-friendly phone system was key to their growth.

“

“Aircall just really took a lot of stress out of the situation itself. It allowed us not only to execute a remote working option for all members of staff, but it allowed us to then continue with a really solid hybrid policy across the business,”

”

says **Daniel Prescott, Head of Customer Operations at Superscript.**

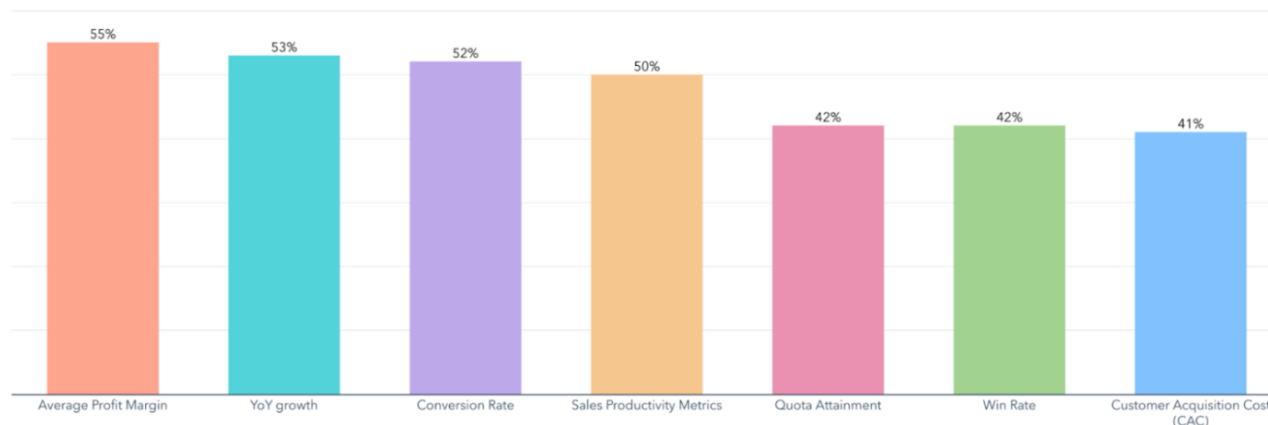
“

“Not having to worry about the telephony system as we expanded into European markets—and allowing people to always feel connected—is so great. No one feels like they’re a million miles away from a colleague. For all they know, they could be sitting right next to them.”

”

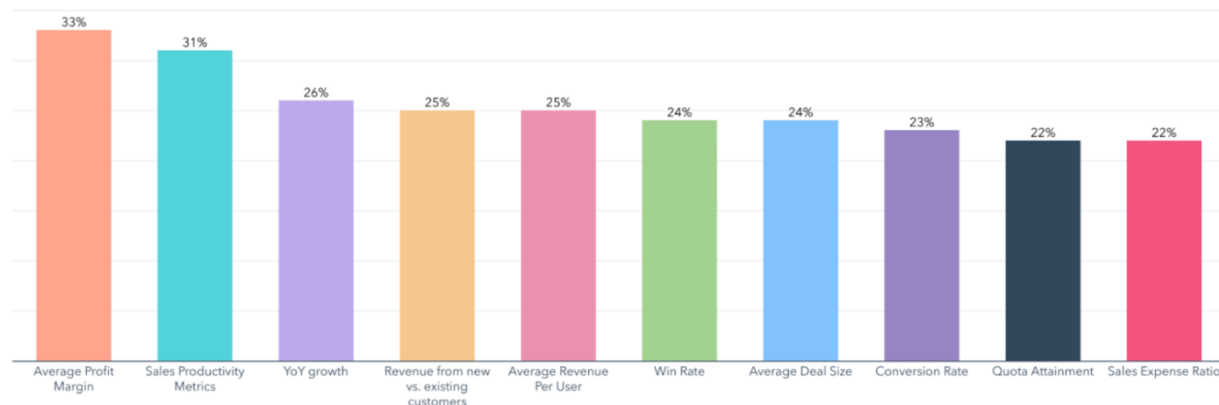
# Chapter 4: Sales Metrics to Track in 2023

Which sales metrics are most important to track (top 7)?



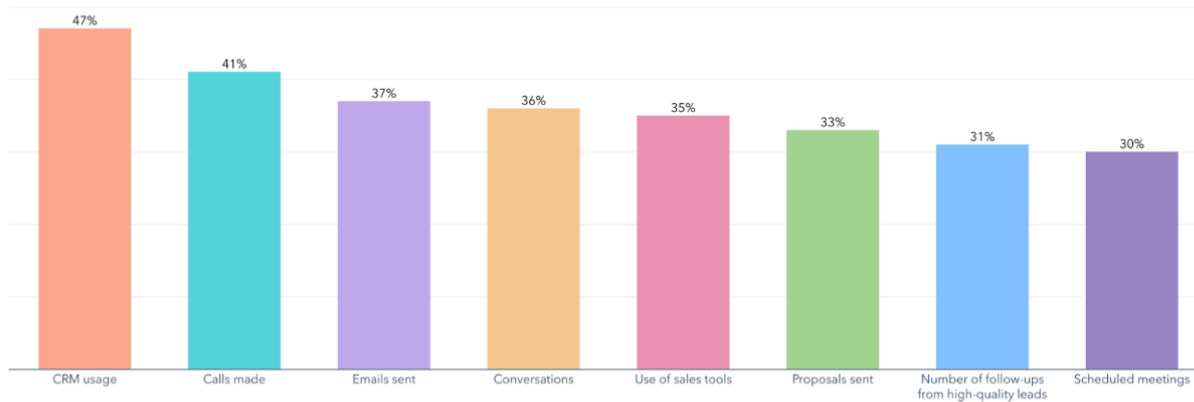
Among 1,000+ global sales professionals, the sales metric deemed the ‘most important’ to track in 2023 is average profit margin, followed closely by year-over-year growth and conversion rates. Customer acquisition cost (CAC) used to be a top metric for sales, but it can be hard to measure and has lost popularity in recent years.

Which metrics do salespeople track (top 10)?



Salespeople are most likely to track average profit margin and their own productivity metrics, along with year-over-year growth. For sales leaders, when asked what they do track, they say CRM usage, calls made, emails sent, and conversations. They want to know what's happening at the moment and keep a close eye on overall progress and productivity. But when asked what's most important to track, leaders are looking for calls made, follow-ups on high-quality leads, CRM usage, and proposals sent.

Which sales rep productivity metrics do sales leaders (manager+) track (top 8)?



In 2022, **CRM usage** is the most important indicator of productivity in sales.



# Chapter 5: Lead Generation Strategy

One of the top challenges for salespeople is a lack of high-quality leads. But 41% say that they do receive quality leads from their marketing teams. Where's the disconnect? In 2022, salespeople find that the best quality leads come from referrals, followed in a distant second by social media, tradeshow and events, telemarketing, inbound marketing, and digital marketing efforts like website, blog, and SEO.

According to sales teams, the **best quality leads come from referrals.**

What “quality” leads means has changed over the past few years, largely due to changes in consumer behavior.

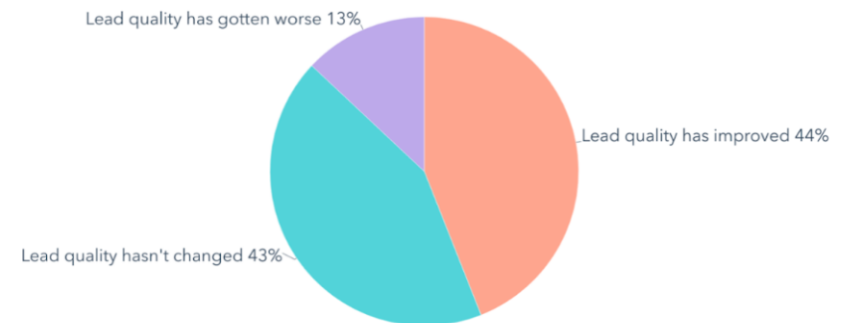
## Finding High-Quality Leads

In 2021, the top marketing channels for lead generation were social media, SEO, and account-based marketing. In 2022, [influencer marketing and short-form video became priority channels for marketing growth](#), along with virtual events and mobile-focused web strategy. More than half (56%) of sales representatives feel that lead quality has stayed the same or gotten worse from 2021 to 2022, which could be attributed to marketing and sales strategies needing to catch up with the times and pivot more quickly than they needed to in the past.

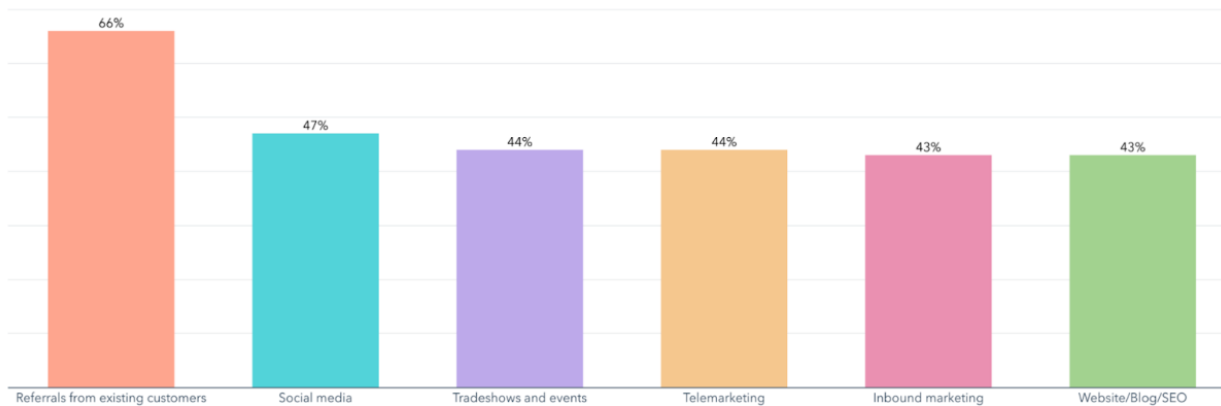
The ways that people engage online and do research have changed drastically, and today sales and marketing teams should focus on referral programs, social media and encouraging user-generated content, and virtual events.



How has lead quality changed from 2021 to 2022?



Which source offers the highest quality leads (top 6)?

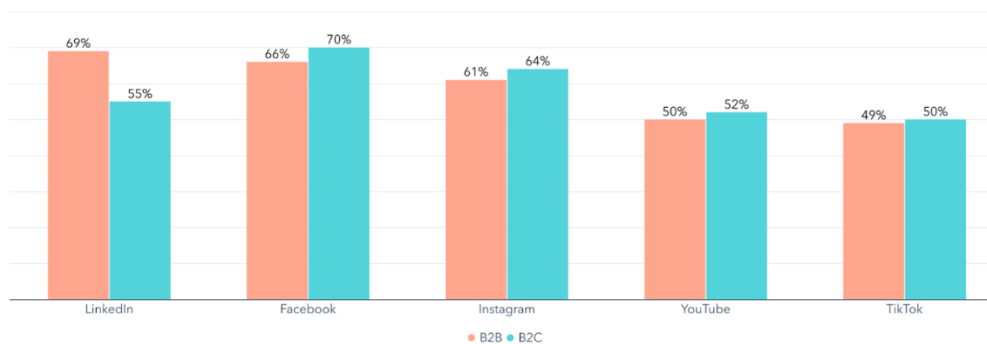


## Using Social Media for Lead Generation

In 2023, B2B sales reps plan to use LinkedIn, Facebook, and Instagram to find new prospects and leads. B2C sales reps are more likely to use Facebook and Instagram, and more than half are also on LinkedIn.

YouTube and TikTok are growing as channels for both B2B and B2C sales and marketing, with short-form video on the rise in the professional space.

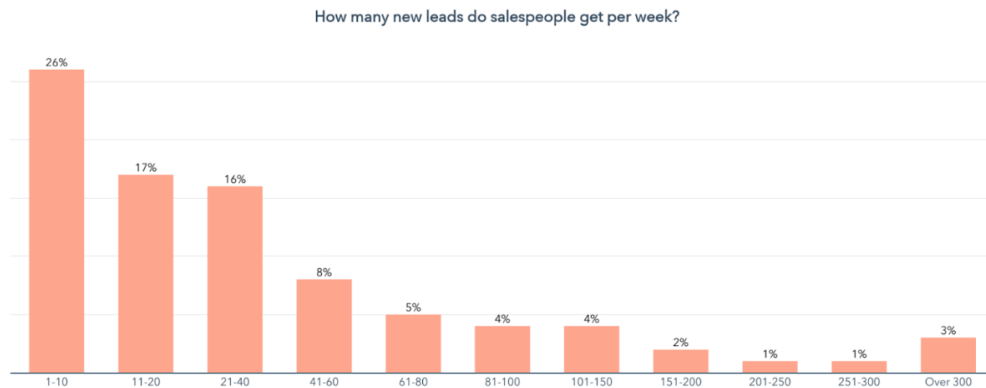
Which social media platforms are most effective for finding new prospects (top 5)?





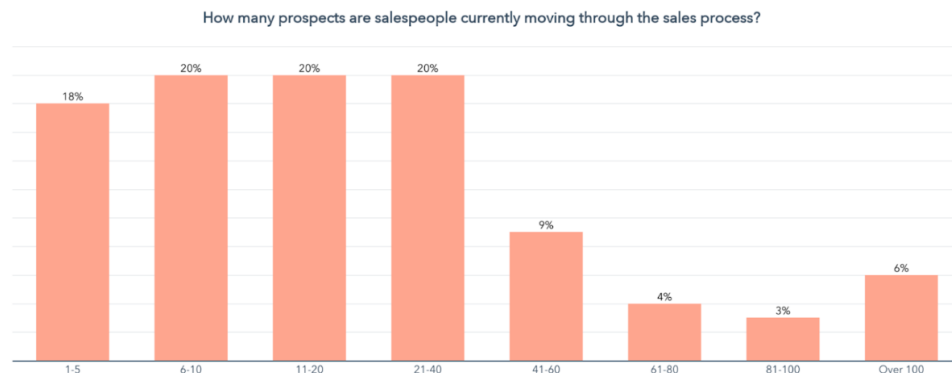
## Sales Pipeline Averages

Sales leaders need ways to benchmark their team's performance and understand what a healthy [sales pipeline](#) looks like in a given quarter in the context of the regional and global economy.

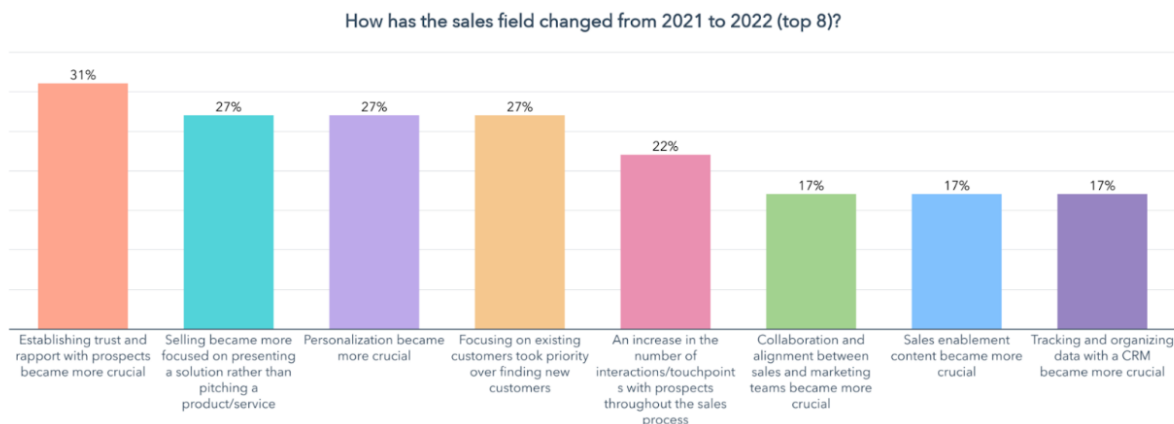


In 2023, sales leaders can estimate that in order to see sustainable growth, sales representatives should get 1 - 40 leads per week. And 78% of salespeople have anywhere from 1 - 40 prospects moving through the sales process at a given time.

As an additional point of reference, the [average SaaS sales cycle is 84 days](#).



# Chapter 6: Year-Over-Year Comparison of Sales Performance in 2021 vs. 2022

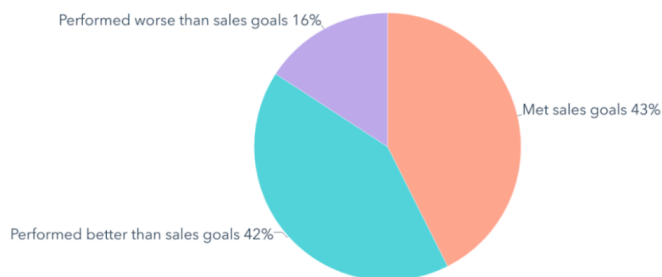


Eighty-five percent of sales representatives reported meeting or exceeding their sales goals in 2021. That number dropped slightly in 2022 to 82%. The biggest changes to the sales process in 2022 were:

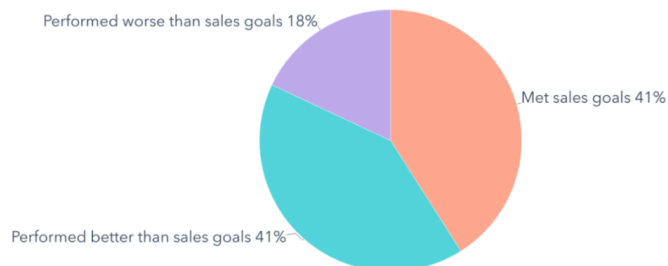
- 01 More demand for establishing trust and rapport with prospects
- 02 Using solution-based sales pitches rather than product or service-based pitches
- 03 Needing to use even more personalization to close deals.

Another major change noted was a new focus on prioritizing existing customers over new ones. Upselling and cross-selling require different strategies, tools, and expectations from sales managers, so sales teams should identify these goals ahead of time and only pivot after analyzing performance from each quarter.

How did salespeople perform in comparison to their sales goals in 2021?



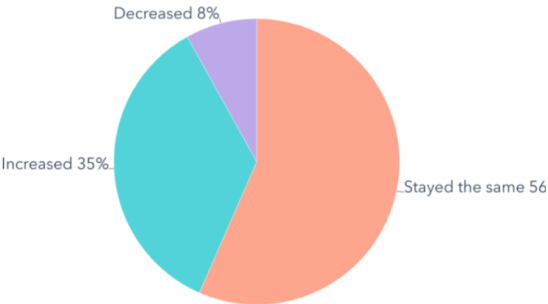
How did salespeople perform in comparison to their sales goals in 2022?



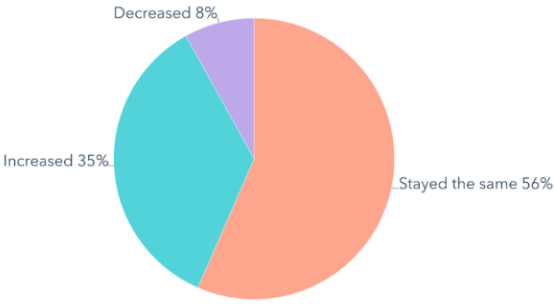
When asked if selling remotely has an impact on sales performance, one in five (21%) salespeople feel that it's harder, but more than one third (36%) find that it's easier to sell virtually. This could be due to the fact that all the information they need is right in front of them, or because some salespeople feel more comfortable and confident in their own homes. For hybrid sales representatives, however, 46% feel that selling remotely is less effective.

Overall, sales win rates, deal sizes, and close rates have stayed the same or increased since 2021, showing promise for the year ahead.

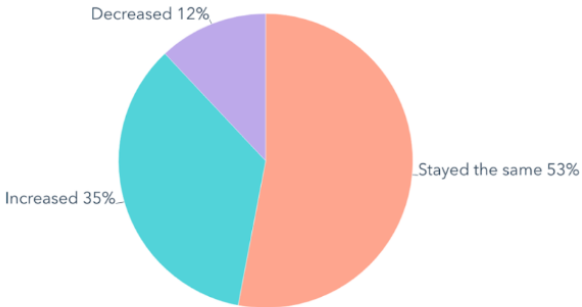
How has the average deal size changed from 2021 to 2022?



How has the average deal size changed from 2021 to 2022?



How has the average sales close rate changed from 2021 to 2022?



“2023 is going to be a different year for salespeople as the sales landscape has changed so much. Before this year, sales reps could go onsite to build trust and demonstrate why their product was superior to their competition, and they’re no longer able to do that. Most companies I am working with are still not going into the office, so they have to figure out a way to build this trust virtually.”

**Chris Moore, Strategic Channel Account Manager, HubSpot**

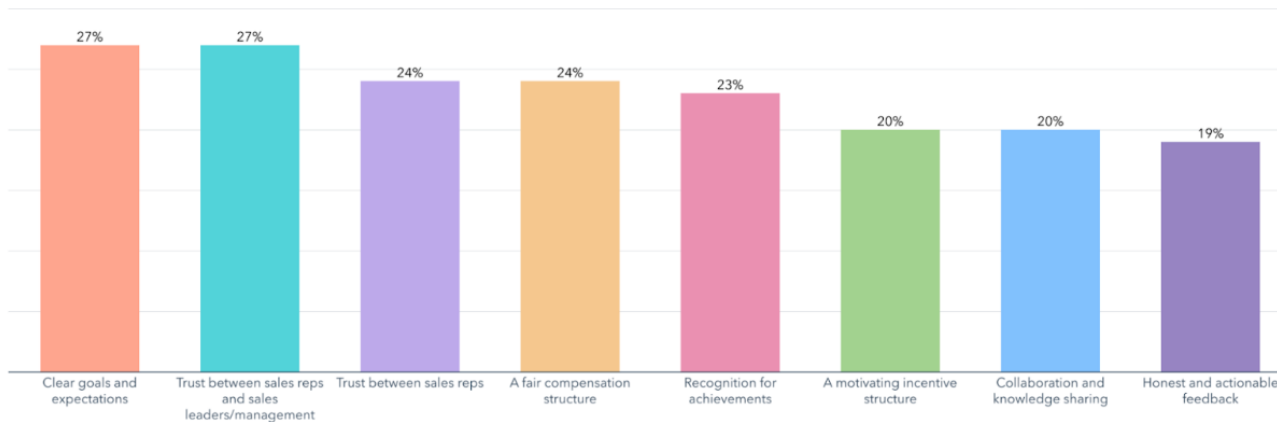
# Chapter 7: Sales Culture

Sales culture is shifting, and leaders now understand what encourages happy employees, and what leads to burnout. Prioritizing a strong sales culture improves employee satisfaction, prevents turnover, and helps employees do their best work.

“What happens when you work for an employer that celebrates your diversity, empowers you to take ownership, and promotes values that align with your own? You are inspired to do your best work, you grow phenomenally, you deliver spectacular results.”

[Radwa Khorshid, Senior Manager, EMEA BDR, HubSpot](#)

Which aspects of internal sales culture are most important for sales people to succeed (top 8)?



The top three most important aspects of internal sales culture that help sales teams succeed are:

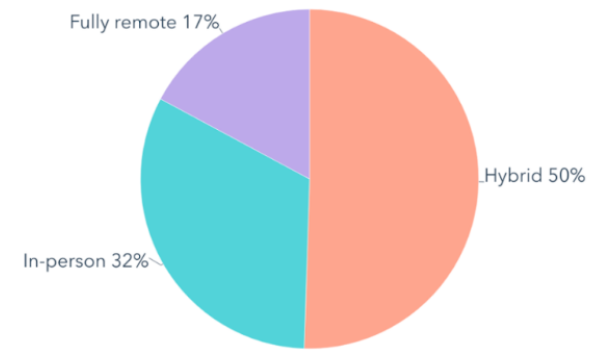
- ✓ Clear goals and expectations
- ✓ Trust between reps and leadership
- ✓ Trust between sales reps

With 67% of sales teams operating under a remote or hybrid model in 2023, leaders will need to invest in virtual teambuilding and collaboration tools, and consider a more flexible org structure than in the past.

“I hypothesize that [the hierarchical nature of sales organizations will flatten] and accelerate over the next five years. More people are working from home — leading to more focus on the output of work, the leveraging of technology to get that output, and cleaner communication. We must simplify things, and therefore, processes. I think we’ll see a shift of more doers and less managers on sales teams.”

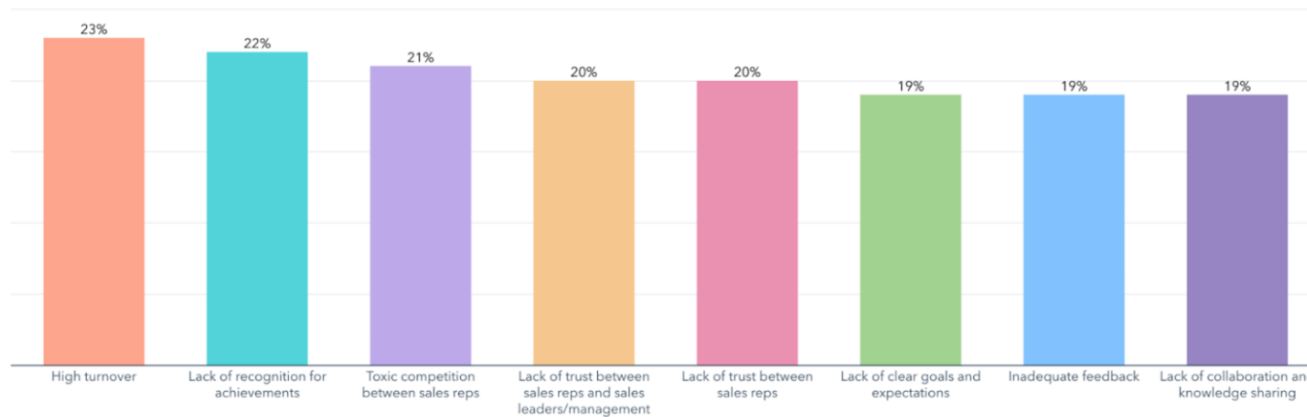
**Stuart Blake, VP of Sales, Help Scout**

Which sales model will reps follow this year (according to sales leaders)?

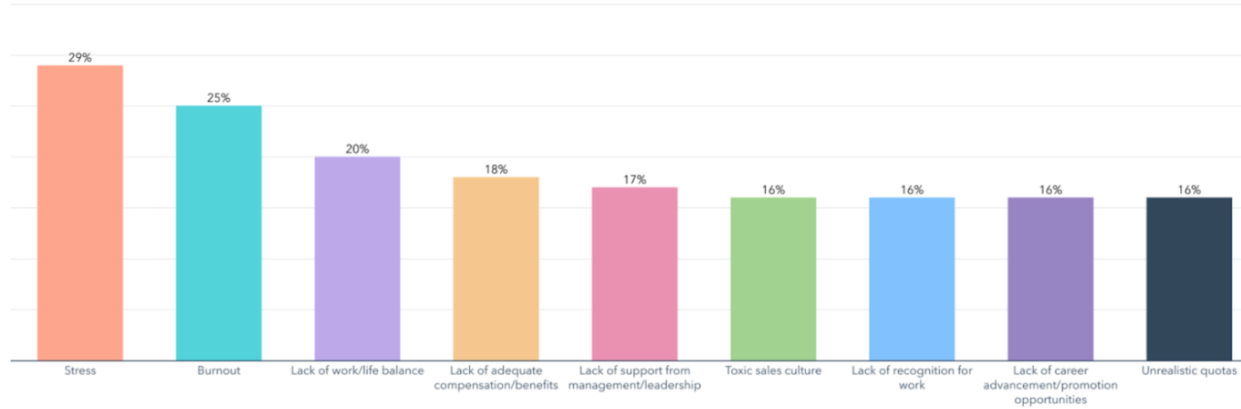


## Retaining Talent + Fostering Success on Sales Teams

Which aspects of internal sales culture negatively impact salespeople's ability to succeed (top 8)?



What causes turnover in sales positions (top 9)?



Experienced salespeople are in high demand and will continue to have their choice of companies and teams into the year ahead. For leaders looking to avoid turnover and support their teams in hitting their goals — here are some dos and don'ts.

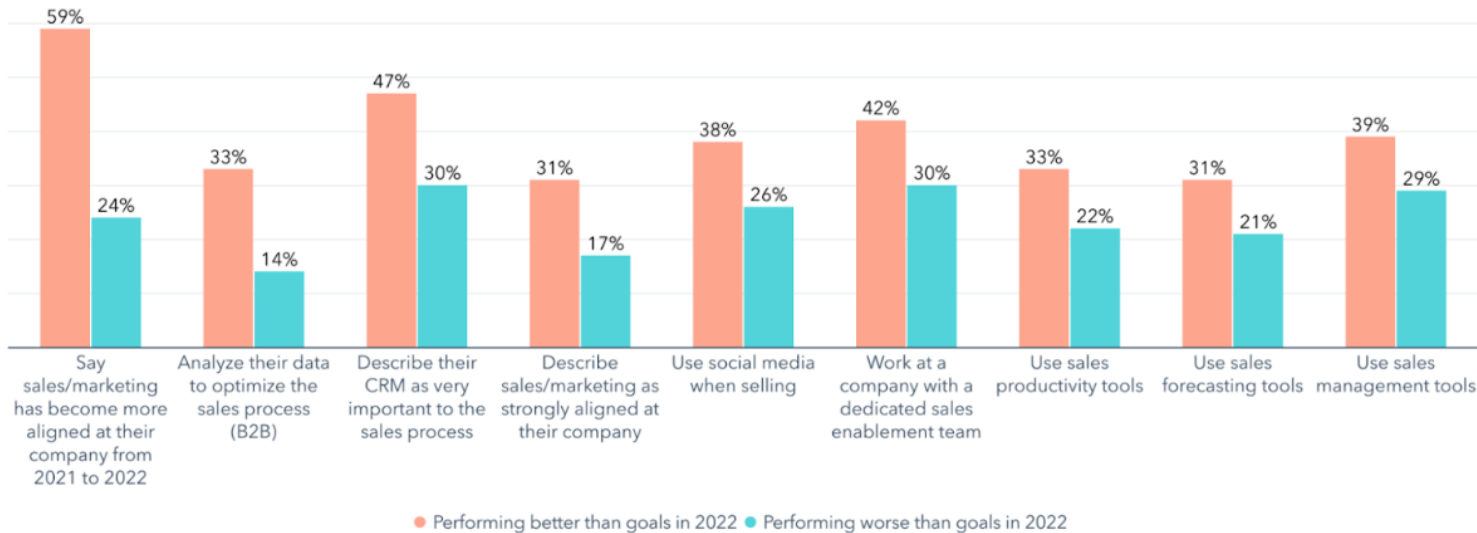
## Great Sales Leadership in 2023

Dos	Don'ts
Watch for signs of burnout and stress	Push teams without checking in
Recognize team members for their achievements	Foster too much competition between reps and create a toxic environment
Facilitate team bonding and mentorship	Silo employees in their own work
Encourage work-life balance	Set unrealistic goals and expectations
Provide thorough feedback and actionable tips	Wait until yearly evaluations to give feedback



# Chapter 8: Trends from Effective Salespeople

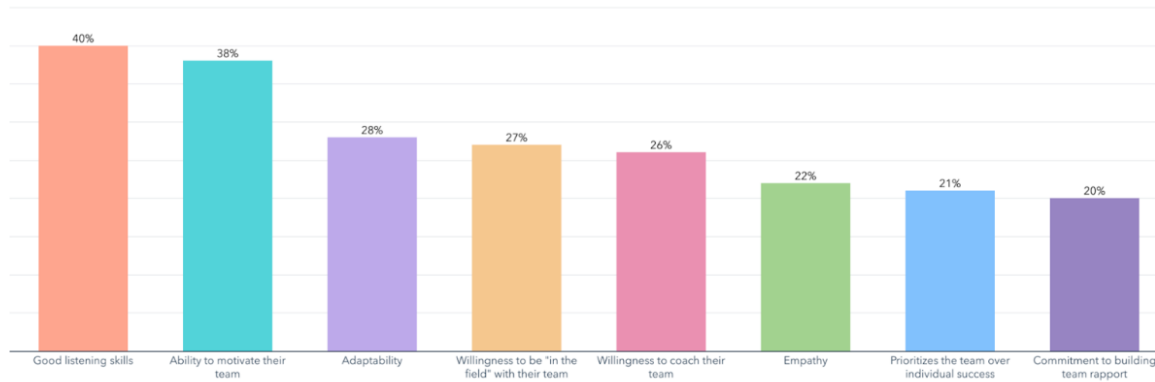
What sets high-performing\* salespeople apart?



\*High-performing salespeople are those who say they have performed better than their goals in 2022

High performing sales representatives have a few things in common — most importantly, they say sales and marketing at their company are strongly aligned (more than in the past), and beyond that, they use their CRM and analytics heavily during the sales process. Successful sales teams are more likely to have a dedicated sales enablement team, use social media for sales, and use sales tools for productivity, forecasting, and sales management.

What are the most important traits in an effective sales leader (top 8)?



The most important traits for sales leaders in 2023 are:

- ✓ Good listening skills
- ✓ Ability to motivate their teams
- ✓ Adaptability

“For so long I thought sales was about Closing The Sale. What I’ve realized is how much more enjoyable selling can be when you focus on GIVING value. Not only does it help facilitate a better sales process with more meaning and better discovery, it feels a lot better, too. The best sellers and leaders I’ve interviewed focus on how they can be the best in the world at giving.”

[Jordan Benjamin, Principal Partner Sales Manager, HubSpot](#)

# Closing

Consumer trends and the global economic market will continue to shift over the coming months — sales teams need to be ready to pivot their strategies and showcase exactly why they stand out from the competition. Sales leaders should prioritize sales and marketing alignment and create an environment of support among sales reps on the team — not one of competition.

As companies expand internationally and begin selling in new markets, they can learn from local analyses and prepare new sales teams with localized sales enablement content like market research reports, testimonials and case studies, reviews, and email templates.

The biggest takeaways for sales teams as they plan their goals and strategies for the year ahead are to **align data and tools between customer-facing teams, create personalized content, establish trust and build rapport, and leverage their CRM and automation.**

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- Automatically log call activity in HubSpot to boost productivity
- Activate HubSpot workflows using your call activity to follow up with customers

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