



Executive
Perspectives

02

The Future of Sales with AI

B2B Sales

August 2024

Introduction

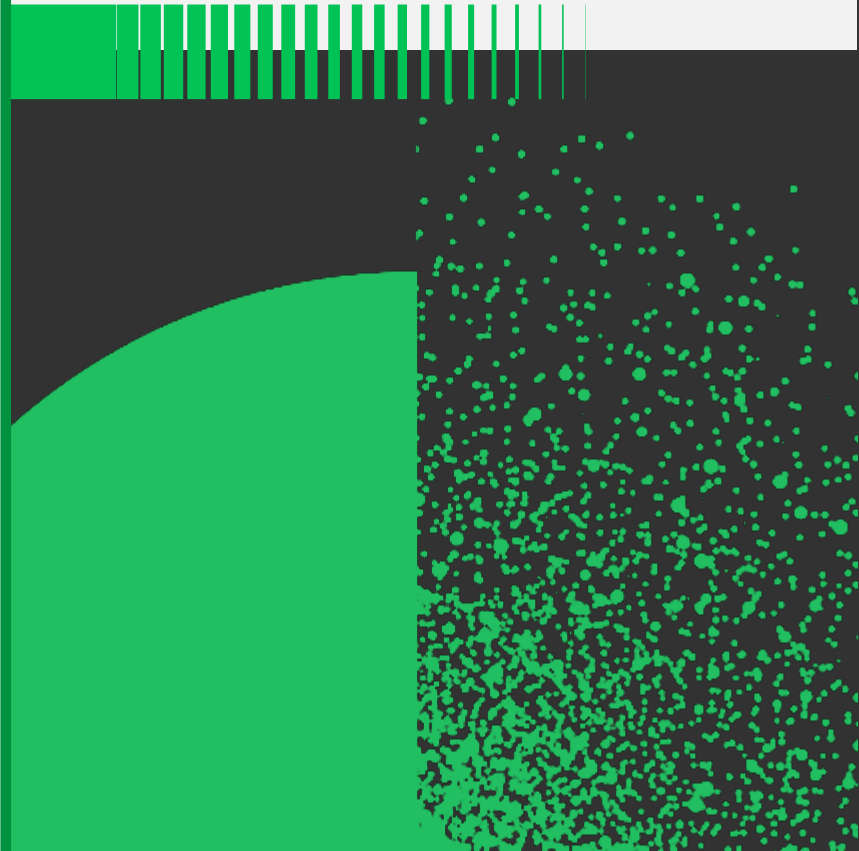
We meet often with CEOs to discuss AI—a topic that is both captivating *and* rapidly changing. After working with over 1,000 clients in the past year, we are **sharing our most recent learnings in a new series designed to help CEOs navigate AI**. With AI at an inflection point, the focus in 2024 is on turning AI's potential into *real* profit.

In this edition, we discuss the future of B2B sales, and the role AI will play in turbocharging growth. We address key questions on the minds of sales leaders:

- What will my sales team look like? Will I need a different team?
- How will the economics of sales change?
- How will the customer experience evolve as a result?
- How do I get started...and how do I get this right?

This document is a guide for CEOs and sales leaders to cut through the hype around AI in B2B sales and understand what creates value now and in the future.

In this BCG Executive Perspective, we articulate the vision and value of the future of sales with AI

A decorative graphic on the right side of the page. It features a solid green horizontal bar. Below this bar, there is a dark grey area containing a pattern of small, light green dots, resembling a digital or pixelated effect. A large, solid green curved shape is also visible in the lower-left portion of this decorative area.

Executive summary | The Future of Sales with AI

The time to act on AI in sales is now

Market conditions and economics of B2B sales are rapidly changing: increased competition, evolving buyer expectations, and economic uncertainty create a burning platform to reshape B2B sales

GenAI is a breakthrough technology that, combined with PredAI, enables a step-change from traditional sales to **augmented, assisted, and autonomous selling**

There is an opportunity to drive **1.8x margin impact** through revenue growth and increased efficiency

Leading players are starting to scale, so **companies need to mobilize to stay competitive**

AI will reshape B2B sales teams and customer experience

Reshape B2B sales teams and roles with massive seller productivity gains, augmented by AI team members and autonomous agents – with specific roles and scale of impact differing by industry

Reshape customer experience by breaking down functional siloes between sales, marketing, and service, and enabling new buying experiences

Executing successfully requires a transformational mindset

To successfully deploy AI in B2B sales and drive **outcomes @ scale**, organizations need to take a **portfolio and transformational mindset, combine GenAI and PredAI** within the tech stack to enable AI team members, and **rewire the op model** with a 90% focus on people and process change

Sales leaders play a critical role in driving this change, breaking down siloes between teams, and making bold investments in tech and upskilling

To get started, define your objectives and North Star, prioritize use cases, and start with proof-of-concepts that demonstrate value, and scale up successive waves of capabilities while enabling the sales team

Why now | 6 key trends shaping market conditions and economics for B2B sales ...



Increased competition

Commoditization and a surge of new entrants are driving companies to invest in retaining customers via post-sales support, customer success programs, relationship management, and value-added services



Shifts in buyer expectations

B2B buyers expect a consumer-like buying experience with ease of access to information and quick response times, pushing sellers to offer intuitive and user-friendly buying processes



Longer sales cycles

Decision makers are getting more complex (e.g., buying groups) and taking more time to evaluate options, due to increased scrutiny on ROI and cost-effectiveness



More sellers involved in sales process

Sales teams are becoming more specialized, requiring more comprehensive and integrated sales strategies to address complex buyer needs with cross-functional teams



More complex channels

The ecosystem of partners and marketplaces has grown in scale and complexity yet remains a critical channel to drive scale and efficient cost to sell



Uncertainty and budget constraints

Rising cost of goods, economic fluctuations, and uncertainty are leading to tighter budgets and higher scrutiny on spending from buyers while increasing cost pressure on own P&Ls

... fueling the burning platform to transform

AI can shape companies' response to these dynamics...

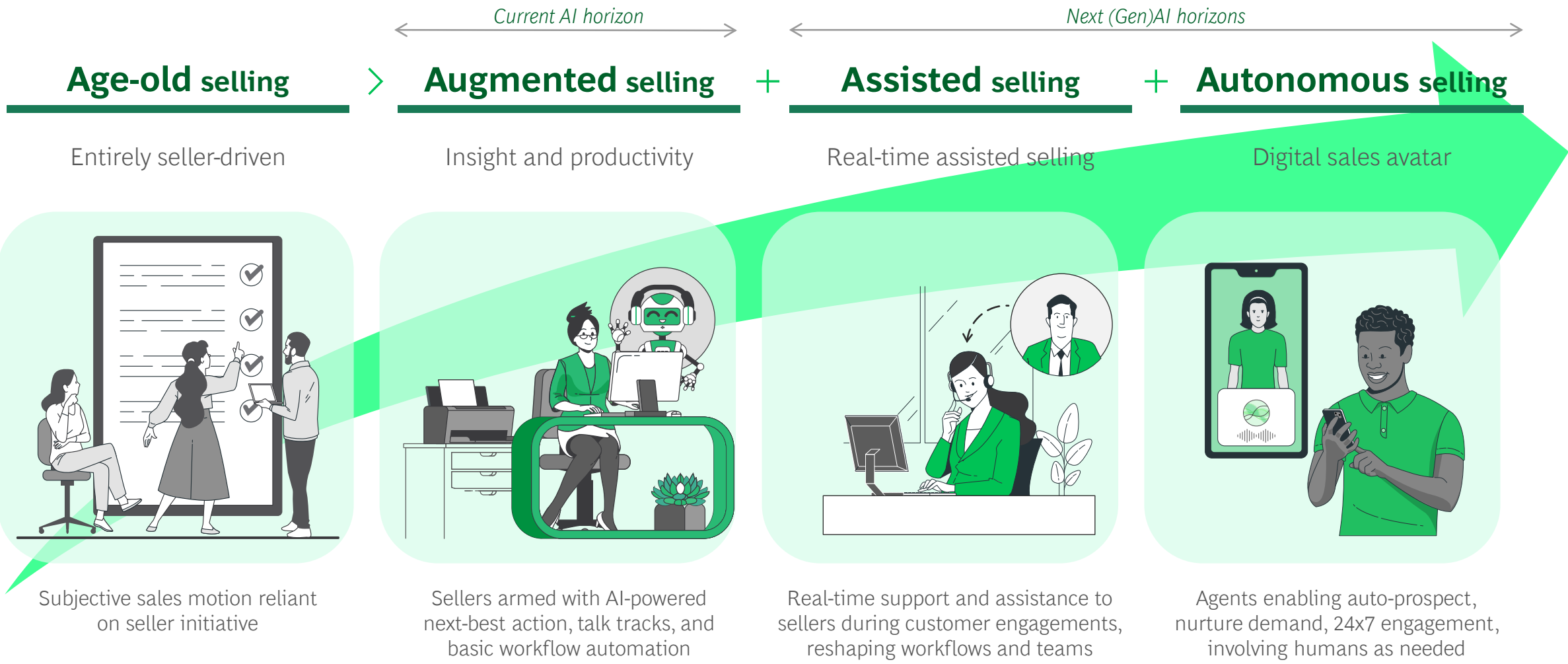
- Personalize offers and experiences
- Predict churn and trigger actions
- Automate routine tasks and services

...while unlocking more growth with higher returns

- Drive more effective acquisition
- Unlock better cross-sell/up-sell
- Reduce cost to serve

Leading players are starting to scale, so companies need to mobilize to stay competitive

The future of sales | Turbocharging scalable growth with AI at its core





The Future of Sales

Autonomous sales agents

... **autonomous sales agents own sales motions from acquisition through support**, for B2C and long-tail B2B customers, enabling personalized selling at scale

GenAI-powered virtual team members

... **sales teams are augmented by GenAI team members**, like intelligent sales assistants, providing personalized scripts and customer insights or virtual solution engineers, navigating complex portfolios and customizations

Divergence of strategic vs. transactional sales

... **virtual sales** assistants take over more transactional tasks, reducing the need for human intervention in standard transactions and freeing up time to focus on strategic and relationship selling

“Smart selling” through real-time analytics and coaching

... **predictive selling becomes the norm**, with automated, real-time analytics and coaching fully integrated into sales tools, enabling agents to sell to the right customer, in the right moment with the right offer, price, and message

AI-powered hyper-personalization

... **personalized offers, promos, sales pitches, and sell-in** materials based on real-time buyer behavior and data analytics **are produced at 10x the speed**, breaking down traditional silos between marketing, sales, and pricing

Highly autonomous sales operations

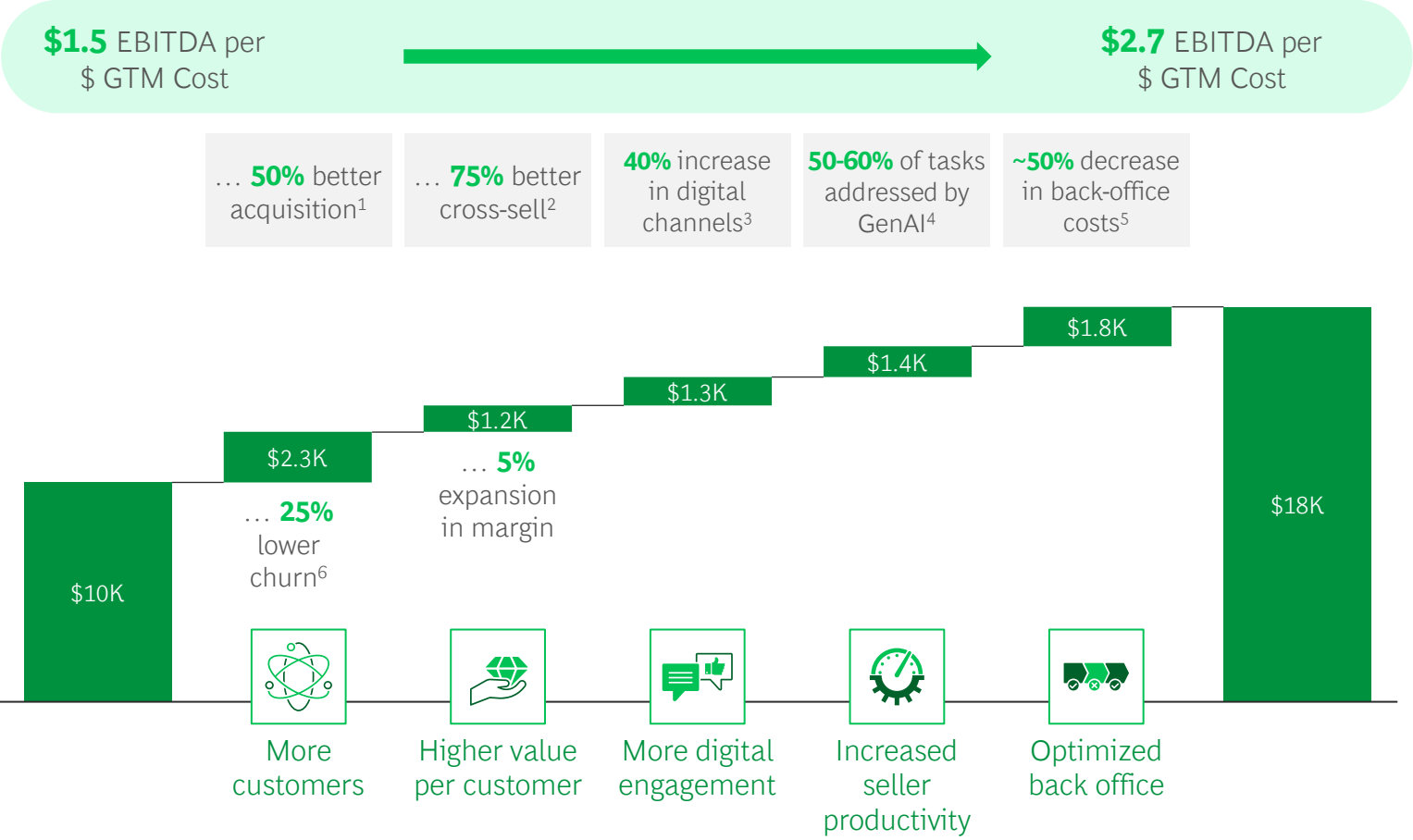
... **fully automated AI systems** manage much of sales operations, including targeting, lead scoring and nurturing, and forecasting, reducing errors and increasing efficiency

Revolutionized sales enablement

... **AI-powered coaching** and scenario-based learning **based on real-world** insights from everyday sales interactions unlock step-changes in seller performance, reduced ramp-up time, and dissemination of best practices into everyday action

Value | 1.8x margin impact through CLV growth and GTM efficiency

Seller Joe, with a sales quota of \$10K EBITDA per week (\$4K loaded per week + 40% indirect sales costs)



Realization of these types of impacts requires investment

-  AI capabilities at scale, embedded in the flow of work
-  Upskilling and new ways of working for existing sellers
-  New talent and agile operating model to continually innovate
-  User engagement throughout the journey to enhance adoption

1. Assuming 30% new vs. recurring business; 2. Assuming 10% cross-sell of full deal value; 3. Assuming 20% digital value; 4. 30 – 40% conversion of time to revenue; 5. Assuming 50% reduction in contract management, issue resolution, and data management; 6. Assuming 10% churn rate. Source: BCG experience

Value | We are moving clients toward the future state and unlocking value through cutting-edge AI solutions across the sales life cycle

Cross-industry, not exhaustive



Autonomous Agent



Sales Assistant

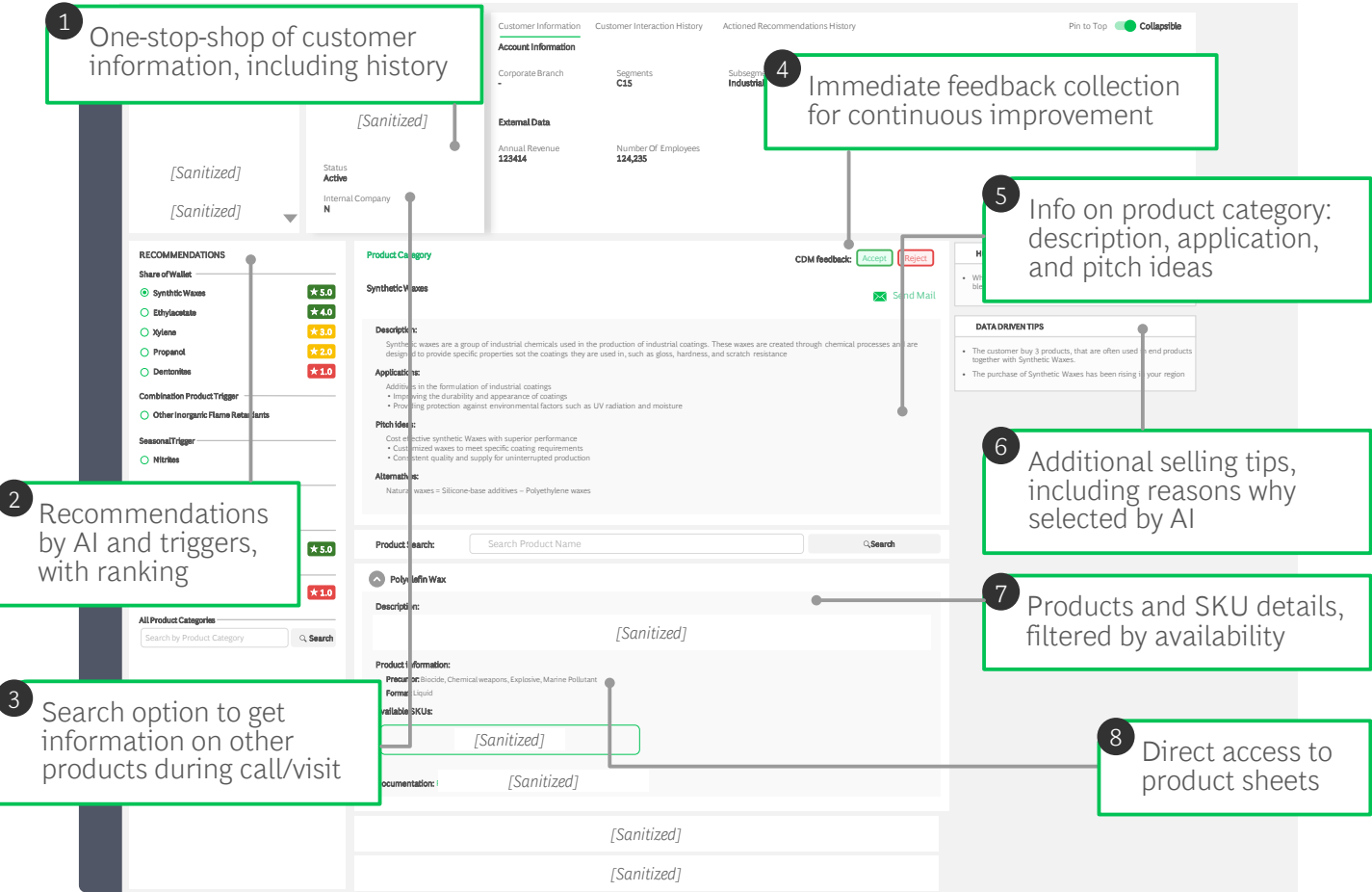


Solution Engineer



Sales Coach

Example use case | Sales assistant provides next-best action, improves quality of customer conversations, and increases efficiency



1. Based on initial indicators during project/pilot
2. 98% of responses of sales= rep are tool/logic "meets" or "exceeds" expectation in a fully anonymous survey
Source: BCG

Example: Industrial Goods

High impact during 1st experiments

30-40	New leads on cross-sell per sales rep every month
3-5%	EBITDA increase in pilot regions expected in 2024 ¹
98%	Sales rep satisfaction and high adoption rates across ²

Five key elements for AI buddy solution

1	 Centralized customer info	Customer info, including interactions, in single, unified interface
2	 Product recommendations	Ranked product recommendations based on customer data and triggers
3	 Comprehensive product information	Descriptions, applications, and pitch ideas, to support sales efforts
4	 Real-time feedback and selling tips	Collection of feedback for continuous improvement and selling tips
5	 Direct access to product details and sheets	Products and SKUs filtered by availability, direct access to detailed product sheets provided for customer presentations

How to get it right | Our perspective on winning with AI in sales



Reshaping to drive outcomes

Reshaping B2B sales teams and the customer experience with AI

- Leading with a bold vision for the future of sales
- Restructuring B2B sales teams to change the composition and introduce AI team members to augment sellers
- Redesigning the customer experience by breaking functional siloes between marketing, sales, and service



Unlocking data and tech

Combining PredAI with GenAI to maximize value creation

- Unlocking value with GenAI as the “next layer” to activate PredAI decisions and precision
- Accelerating scalable solutions by helping engineer the target state architecture, leveraging the right ecosystem of partnerships



Rewiring the op model

Transforming people and operating model for competitive advantage

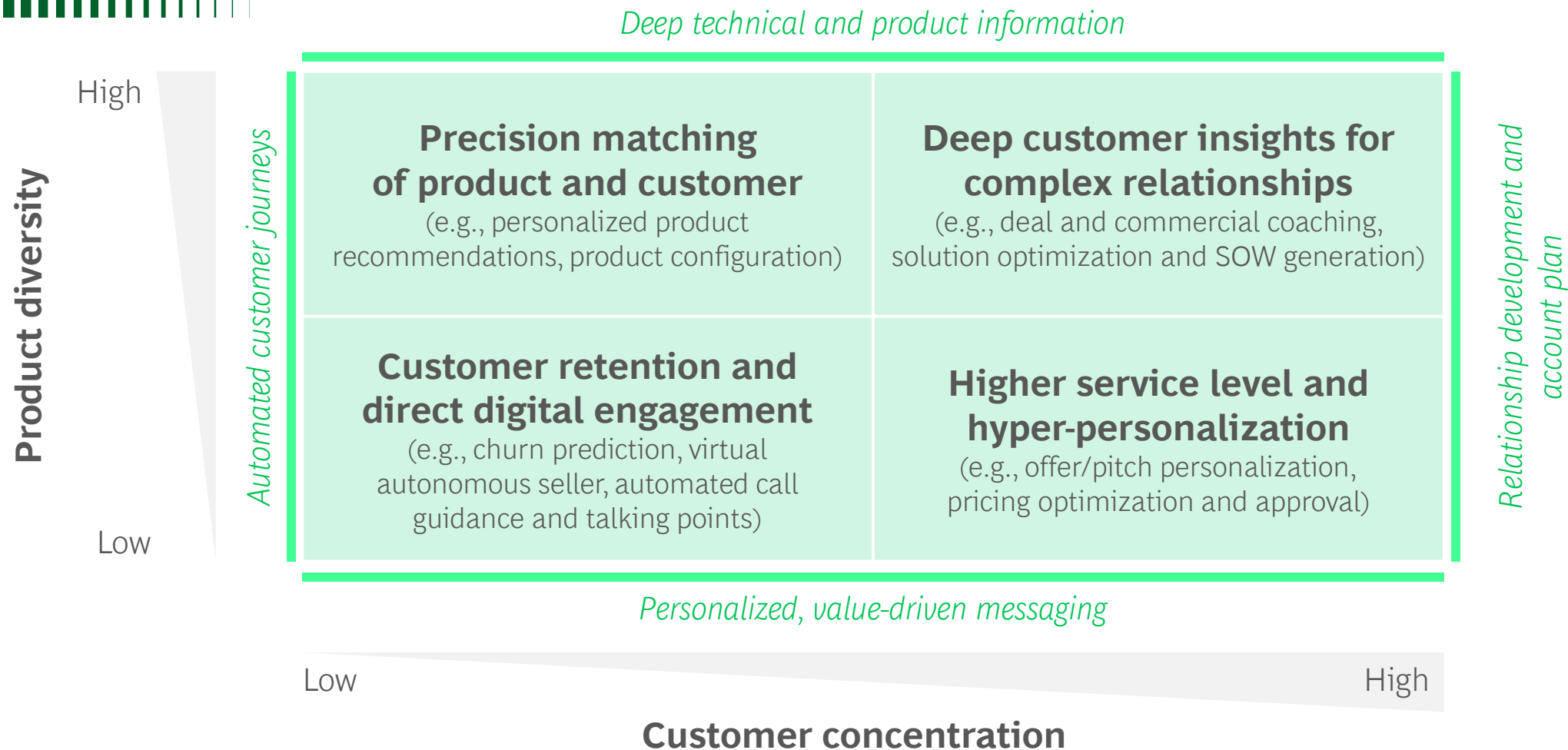
- Shaping the future sales roles and op model, and scoping the skills and change needed
- Building an AI experiment and scale muscle through build-operate-transfer

Reshaping B2B sales teams | Investment in AI will enable a change in team composition

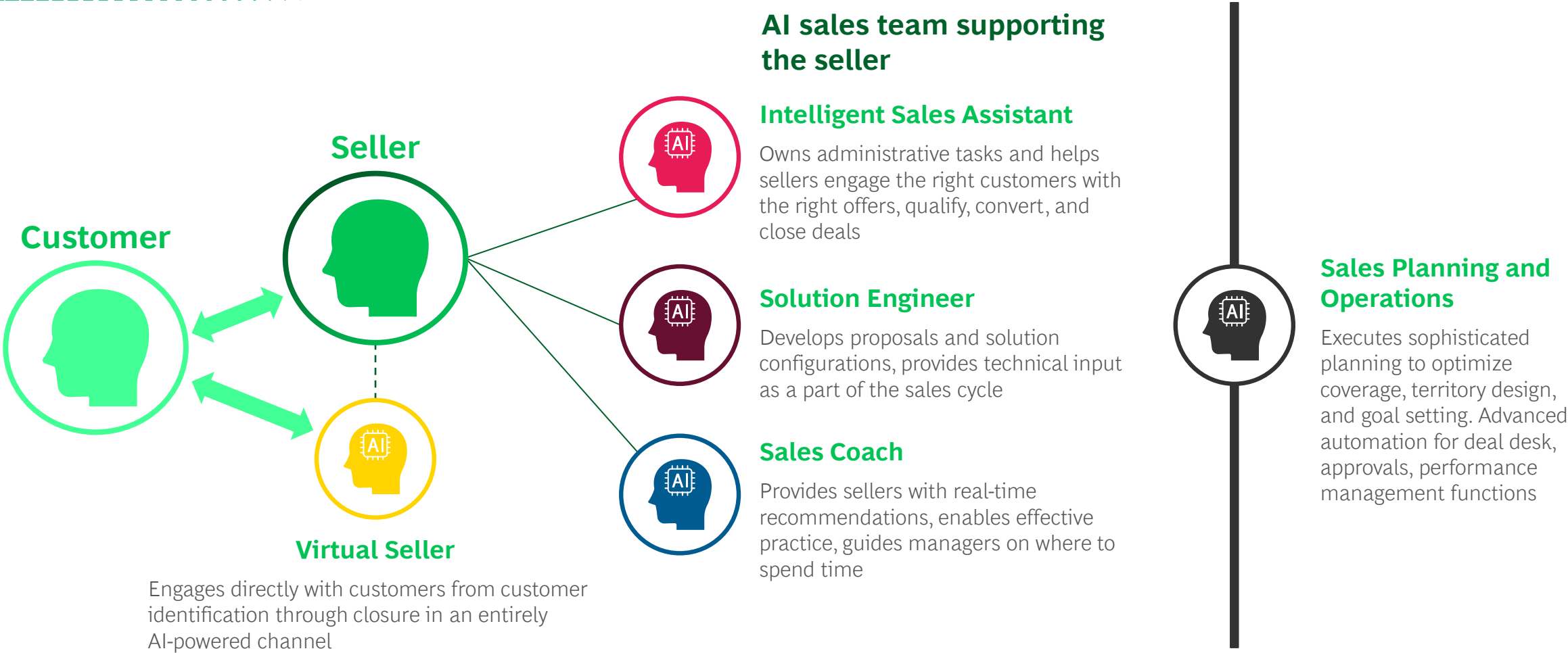
Today		Future		Key changes	Illustrative – roles and impacts will vary by industry
Marketing Ops		70% redeployed for brand marketing	Brand Marketing Marketing Ops	• Marketing Ops – automated targeting and fast journey tailoring, higher focus on brand marketing	  ¹
KAM Acct Mgrs ISR Field Sales Distributor Mgmt		40% redeployed for growth	KAM Acct Mgrs ISR Field Sales eCommerce Specialists	• KAM – more accounts per team as non-client-facing work dramatically reduced • ISR – shift of interactions to remote settings; many efficiencies from tech augmentation • FSR – many interactions moved to remote and AR-enabled (including demos, order taking)	  
Customer Success Customer Service		30% customer service redeployed toward customer success	Customer Success Customer Service	• Customer Success – differentiator, requires human intervention for complex solutions • Customer Service – heavy automation through self-serve and autonomous agents	 
Sales Training Sales Operations		80% sales ops redeployed to data and tech CoE	Sales Training Sales Re-skilling Sales Ops Data and Tech CoE	• Sales Training and Enablement – AI to automate training, but critical change mgmt. and re-skilling task will be differentiator • Data and Tech – many tasks automated, but new data/tech roles required for model training, prompt engineering, product owner	  ¹   ¹

Note: Illustrative – only selected sales roles shown for directional impact
1. Original function expected to reduce headcount, and other function (e.g., brand marketing, sales re-skilling, data and tech CoE) expected to increase headcount

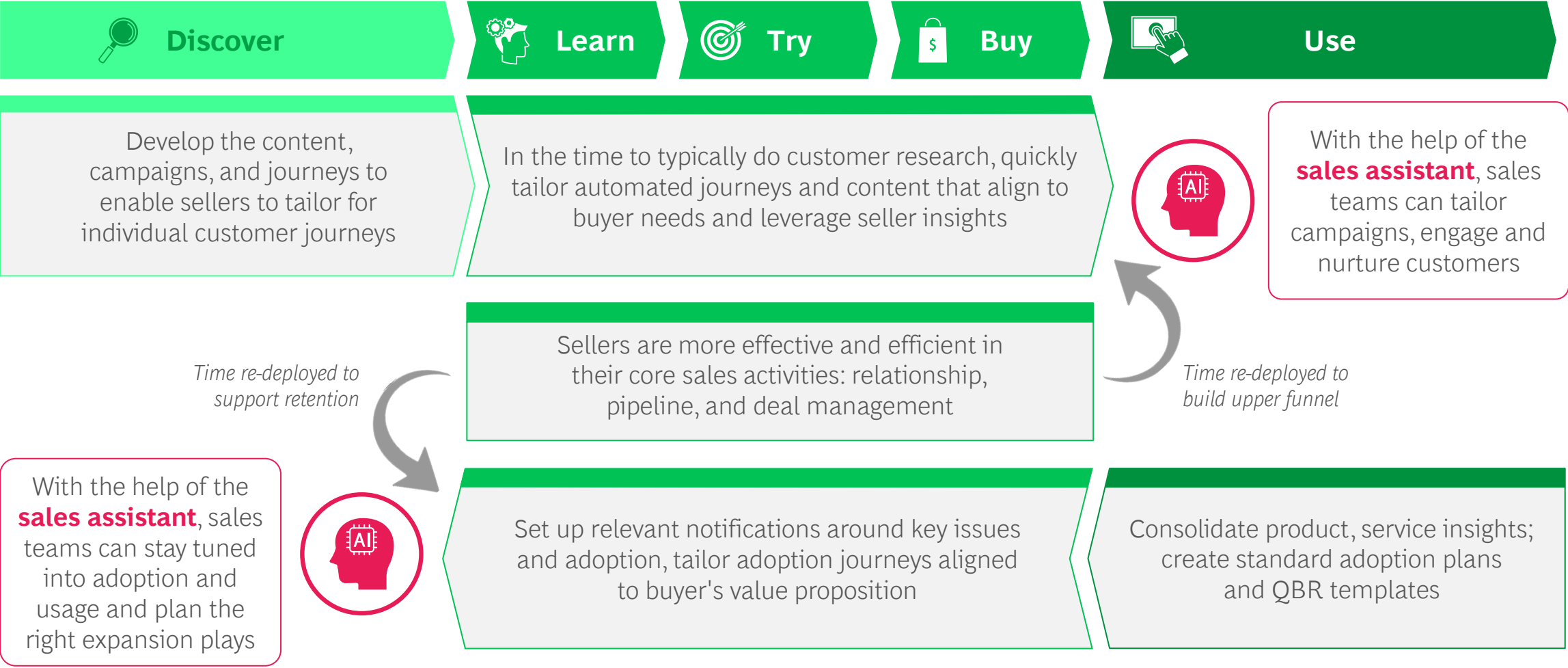
Reshaping B2B sales teams | Value levers will differ across sales models and industries



Reshaping B2B sales teams | New AI team members will amplify the impact of sales teams



Reshaping customer experience | AI will break functional siloes between marketing, sales, and service to better orient around the customer



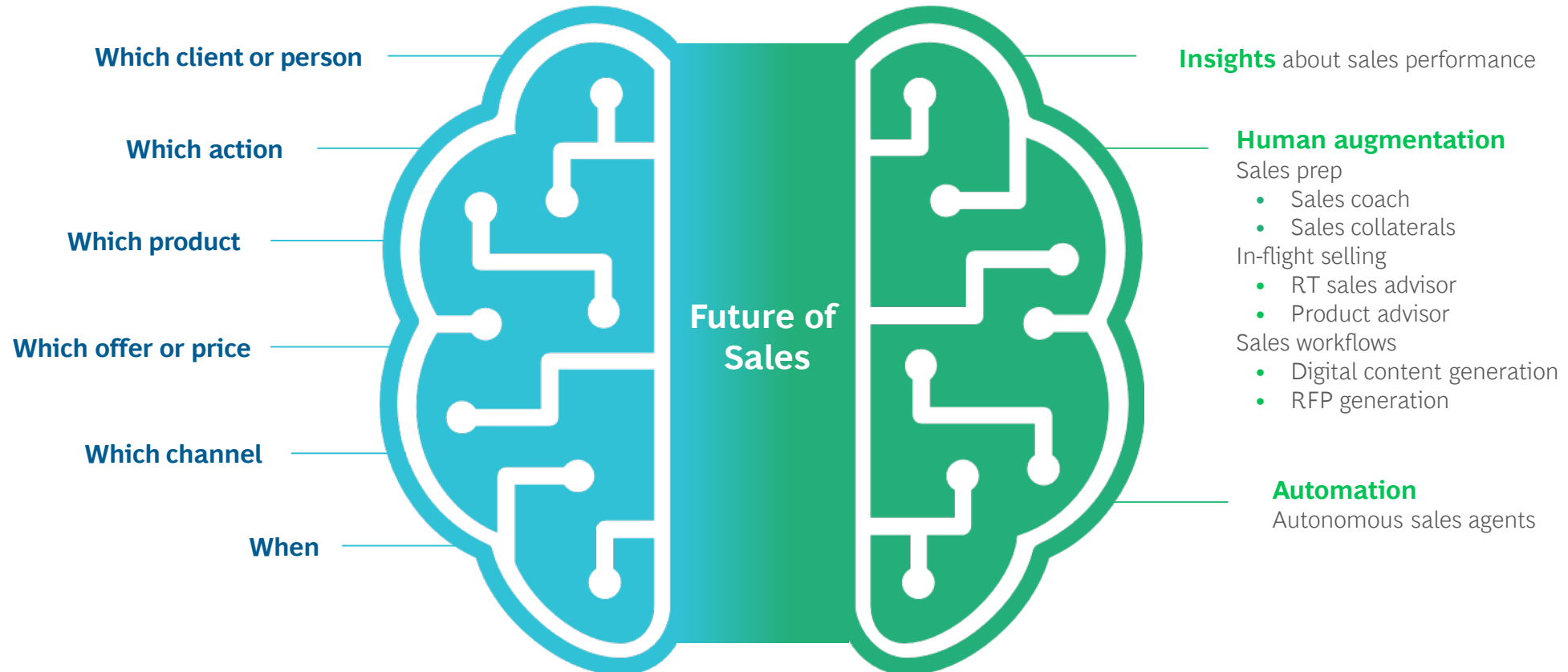
Unlocking data and tech | Combining PredAI + GenAI to maximize value creation

(Traditional) Predictive AI/ML for decision making

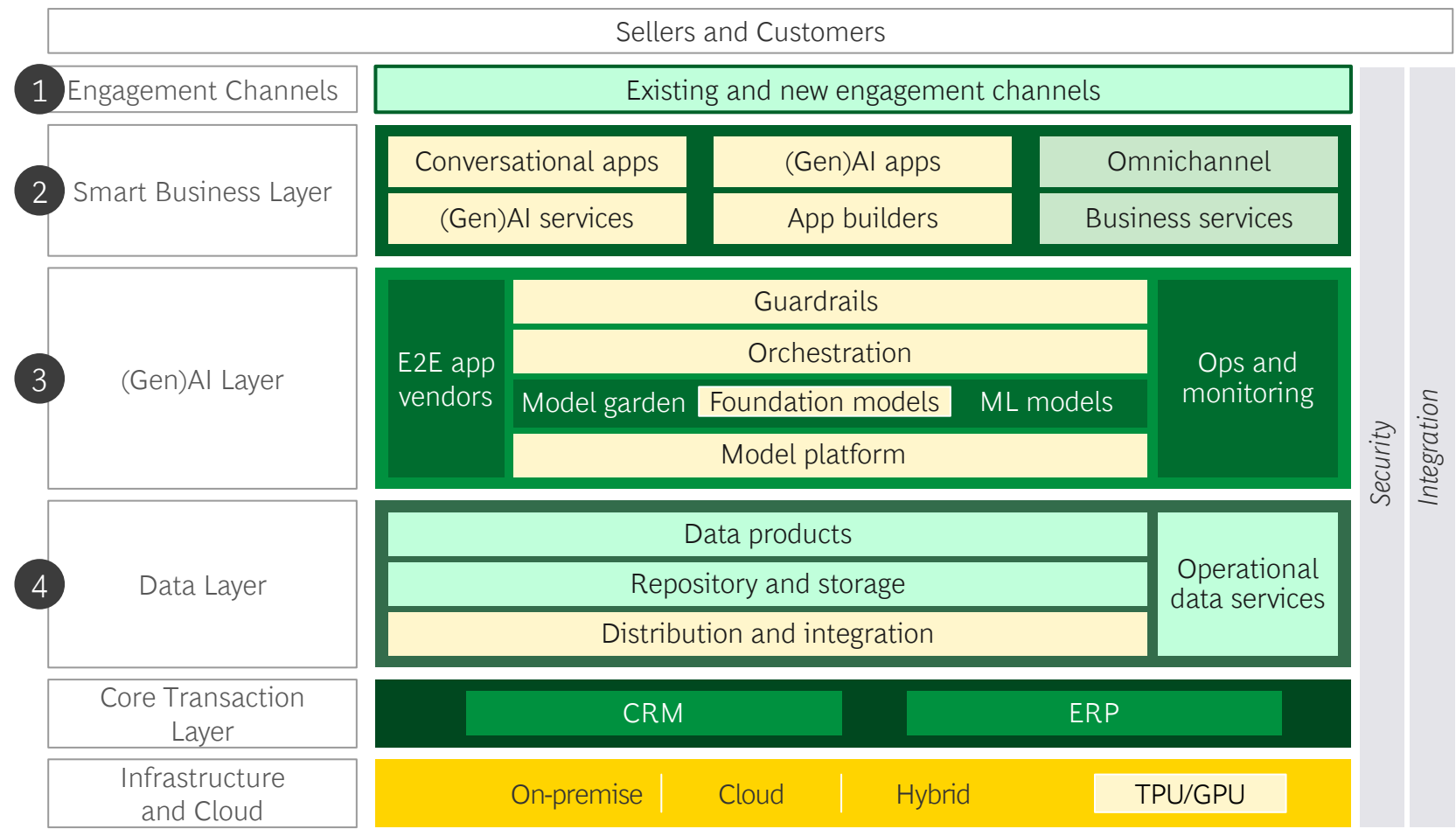
Precision – eliminating the guess work

GenAI for augmentation and automation

Productivity and performance improvement



Unlocking data and tech | New reference architecture as tech stack evolves to support integrated delivery of PredAI and GenAI at scale



New/upgraded elements

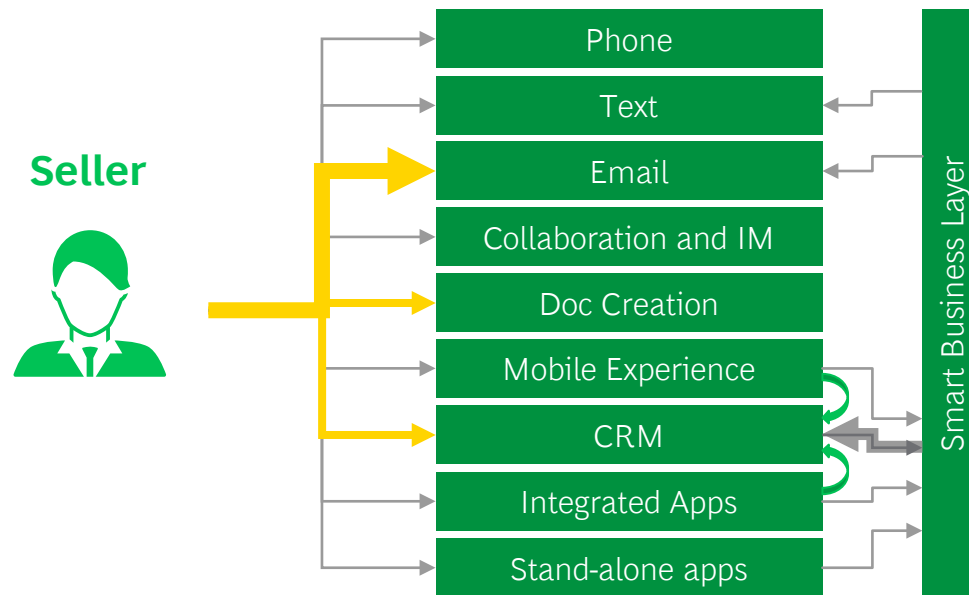
Note: The engagement channels are typically represented as part of the respective components of the smart business layer, but we have explicitly represented them here given their importance in the sales processes

Key evolutions

- 1 Engagement Channels** become tightly integrated through the smart business layer, enabling sellers and customers to interact with each other and GenAI team members, seamlessly flowing between channels of choice
- 2 Smart Business Layer** adds (Gen)AI applications and supporting development tools powered by GenAI, also enabling the integrated delivery of PredAI and GenAI. Hosts the GenAI team members
- 3 New (Gen)AI Layer** supports secure access to and use of both internally and externally hosted foundation models, together with any existing ML models
- 4 Data Layer** includes new data sources (typically unstructured and of new modalities) and the means to ingest and use them in (Gen)AI applications

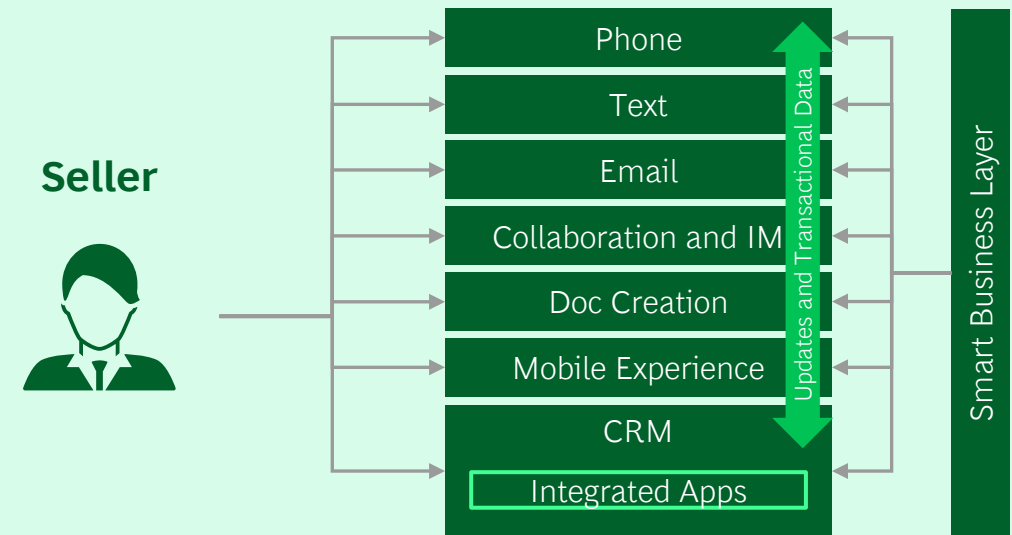
Unlocking data and tech | Integration across all communications modes made possible through smart business layer and GenAI

Current State: Proliferation of mostly separate tools and channels, large effort to coordinate across them



- Attempts to create "SuperApp" as **singular channel providing all capabilities have largely failed**
- Integration between channels is **largely point-to-point**
- **Manual work is expected to translate and capture interactions** apart from those in text (e.g., submitting call reports from visits)

Future State: Integration across all channels, with seamless seller interactions flowing between them



- GenAI enables **integration of all channels, across all modes** (text, voice, image, video, etc.) via a **smart business layer** allowing for easy addition of new channels
- Conversations with customers and GenAI team members **seamlessly transition between channels** of choice and need

Rewiring the op model | Sales AI transformation is 90% change management

Focus on people and process rewiring while building tech, data, and AI capabilities



Typical digital transformation:

10%

AI

20%

Data and technology

70%

Business process change management



90%

Focus on sales change management

- Leadership activation: drive enthusiasm and clear sales vision
- Sales team engagement: co-create and iterate with sales reps
- Executional excellence: redefine sales processes and roles
- Culture and effectiveness: adapt sales strategies and KPIs
- Training and enablement: upskill teams and build capabilities



10%

Focus on technology, data, and AI

- Deploy sales technology to the frontline
- Utilize sales-specific ML models, traditional AI, and GenAI
- Integrate sales systems and automate E2E

Rewiring the op model | Five pillars of sales change management to ensure sustainable impact from AI transformations



Leadership Activation

- Activate leadership to **create role models** for upcoming change management
- Equip leaders with tailored messaging and tools to **effectively communicate** the change vision and benefits
- Create **excitement in leaders** and end users by integrating comms approach into existing sales, global, and geo forums across channels



People Engagement

- Iteratively **co-create** tooling and tech with the frontline to ensure robust technology from the get-go
- Continuously **refine** based on recurrent and frequent feedback sessions
- Share progress with frontline to foster trust in the transformation and outcomes of every sprint



Executional Excellence

- Refine **sales organizations and roles**
- Ensure **responsibility** for global sales tool strategy and roadmap
- Adapt **key processes** (e.g., shorter, more dynamic, cross-functional)
- Review omnichannel collaboration including **capacity of team members and priority shifts**
- Reflect **required governance changes** (e.g., decision input, tech participants)



Culture and Effectiveness

- Implement **new communication and collaboration tools**
- Introduce gamification features to drive peer competition/recognition
- Refine **KPIs to reflect productivity gains**
- Ensure **(short-term) incentives drive adoption** and cross-functional/team/regional collaboration
- Implement **user-level monitoring**



Enablement and Training

- Implement **rapid tool training**
- Develop **training plan** (e.g., new role-play training leveraging KPIs/alerts)
- Build up **(Gen) AI champions** (black belt logic) to act as multipliers and drive change organically
- Activate leaders and champions in sales teams (e.g., via **train-the-trainer initiatives**)

How to get started | Our perspective on the road to unlock the value of AI in sales

- 1 Set a clear objective**
Define **business objective and value levers** for your **AI transformation** (e.g., productivity gains, cost reduction, revenue growth), including upfront success metrics to measure impact
- 2 Define North Star**
Define how you will **leverage AI to reshape your sales approach** and **map required rewiring of op model** (people, process, ways of working, etc.)
- 3 Assess tech stack**
Identify **maturity of tech stack**, create roadmap to required target, and invest in foundational capabilities to sustain transformation
- 4 Prioritize use cases**
Select **use cases**, starting with highest-value ones to fund the journey and defining detailed action plans to seize them; **start small but build to scale**
- 5 Build proof of concept**
Develop proof of concept to **validate value, test, and capture implications** considering principles of responsible AI
- 6 Enable your team**
Create **excitement, enable team participation, and protect learning capacity** for quick upskilling and early adoption through personalized change management plans
- 7 Develop a workforce plan**
Rapidly develop a **comprehensive workforce plan to identify and close talent gaps**, ensuring the necessary skills and support are in place for the broader transformation

Our AI offer | Helping clients reshape the future of sales



**Fast
realization
of P&L
impact
at scale**

by



**Reimagination and transformation of client's sales org
to fully profit from the new tech capabilities**

- Higher effectiveness and efficiency of **sales reps** (inside, field, KAM, ...)
- Decision support for sales **leadership and sales operations**
- New **tech-enabled routes to market**



**Modular tech assets to accelerate time-to-market,
augmenting tech stack toward target state architecture**

PredAI+GenAI
assets

Data
platforms

Enterprise
applications

Integrations

...



As a partner

- Co-creation from 1st day of project
- Enablement to advance the AI/GenAI journey
- Integrated approach, including change management and skills development

BCG Experts | Key Contacts for the Future of Sales with AI

NAMR



Phillip
Andersen



Bryan
Gauch



Japjit
Ghai



Audrey
Hawks



Matt
Kalmus



Justin
McBride



John
Merchant



Marina
Nekrasova



Ben
Quirt



Jit
Tan



Matt
Ward

EMESA



Alfonso
Abella



Lena
David



Roberto
De Angelis



David
Galley



Ignacio
Hafner Roda



Juan Martin
Maglione



Patrick
Müller



Basir
Mustaghni



Jatin
Srivastava



Guillaume
Triclot

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