# Top CRM trends for sales teams

CRM platforms are evolving. Here's how to leverage the future of sales tech to maximize your team's performance.

# The new sales landscape.

## It's CRM, but not as we know it.

Between the ongoing rise of mobile, the ever-changing social media landscape, and a global pandemic that has upended every common practice and well-established rule, it's fair to say that the role of sales teams in enterprise positions continues to be a sea of shifting expectations. Only the most tech-savvy can outperform the competition.

As much as ever, CRM platforms play a vital role in realizing those efforts, but what lies ahead for that centerpiece of the sales stack.

At WalkMe, we've been cross-referencing data and leveraging our deep industry experience to discover what the biggest industry trends will be this year in the world of CRM, and – crucially – what modern CRM best practices will require from sales leaders.

What we've found paints a clear picture: CRM capabilities are evolving faster than ever, and the key to keeping on top of that change is for sales operations stakeholders to empower staff through smarter adoption of their software. Master that, and enterprises can clear the way for sales teams to do outstanding work in all the new ways that modern CRM technology has to offer.

# AI-driven personalization will increase focus.

**Why AI's true CRM potential is actually unlocking new customer insights.**

AI and machine learning are becoming headline features in many modern CRM suites, but – beyond the buzzwords – what can artificial intelligence (AI) really do for sales teams? A key trend is AI-powered CRM software delivering new ways to hone in on potential customer needs through increased personalization opportunities.

Across the board, all signs point to AI becoming an integral part of a sales team's arsenal. For one thing, the IDC expects global spending on AI technology to more than double from 2020 to 2024 – from $50 billion to $110 billion. But that cross-industry investment is now being felt in the sales space – to the point that Grand View Research estimates global revenue from the AI-enabled CRM market will reach $72.9 billion by next year. The Salesforce State of Marketing 2021 report, meanwhile, relays a 186% increase in industry AI use since 2018.

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> **This kind of data-driven personalization can lead to a much more accurate idea of buyer-readiness.**



So AI-powered CRM functionality is on the rise, and its key benefit will be seen in enhanced personalization for the customer. Instead of blanket outreach, AI-driven recommendation tools can comb massive datasets of potential customers, organizing bespoke email campaigns, reports, and offers that resonate with people on an individual basis. Moreover, this kind of data-driven personalization can lead to a much more accurate idea of buyer-readiness.

## Key stats:

**$110b**

Global spending on AI tech by 2024.

**64%**

of 'high performing' brands already have a fully-defined AI strategy.

**80%**

of customers are more willing to do business with brands providing a personalized experience.



## Desiring a 'different relationship'.

Better personalization at every stage of the sales cycle can be a deciding factor for potential customers, but it's only now that CRM platforms are embracing advancements in machine learning that we'll experience a true gear-shift in sales productivity metrics.

These technological developments could not have arrived at a better time.  The data suggests that customers are craving tailored engagement. Recent Epsilon Research reveals that 80% of customers are more likely to do business with brands providing a personalized experience, while Salesforce cited that 79% are willing to share data to achieve it – 88% if the result of that data share is personalized offers.

For teams with access to sales automation CRM suites, this should spark a desire to understand and implement the AI-assisted CRM tools on offer to supercharge their efforts.

Accenture Interactive's Chief Strategy Officer, Baiju Shah, succinctly described the challenge in the company's 16th annual Global Consumer Pulse Research: "Today's consumer desires a different relationship with a brand. Brands must reevaluate and rebuild relevance to these new buyer values and anticipate and meet the needs of their consumers in the moment."

It's a sentiment echoed by leading research. McKinsey data shows that truly nailing customer personalization can deliver eight times the associated ROI, while 64% of organizations defined by Salesforce as being 'high performers' already have a fully-defined AI strategy as of 2021.

# Task automation will boost efficiency.

## How sales teams can unpack and offload their 'work about work'.

According to HubSpot, data shows that the average industry executive "spends around 16 hours a week on routine tasks," and a third of each week doing repetitive work – with the biggest time-sinks being handling emails and analyzing data. Asana's research digs a deeper trench, suggesting that worldwide, workers spend just 27% of their time doing the skilled work they were actually hired to do. That's a lot of time spent on so-called 'work about work', which Asana describes as "the activities that take time away from meaningful work."

Thankfully, there's a light at the end of the tunnel. Closely related to the opportunity for greater personalization (mentioned in our first trend) is an impending task-automation revolution – again, thanks to the AI functionality built into modern CRM suites. And it's in the automation of those routine jobs (and the resulting improvements in resources) that CRMs could be transformative in 2022 and beyond.

Automation for everyday tasks within CRM suites should be a flexible and fine-tuned solution, but McKinsey indicates that as many as a third of sales processes could be offloaded. Tools like Salesforce Einstein, Adobe Sensei, and Oracle AI can handle tasks like lead scoring, email writing, and report creation, which means sales teams can spend more time actively selling.

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That increase in productivity is why Forrester predicts that spending on automation tools will balloon to $25.1 billion annually by 2023.

**Key stats:**

# 27%
of weekly time global staff actually spends doing skilled work.

# 16
hours a week spent on routine tasks.

# $25.1b
Global annual spend on sales and marketing automation tools by 2023.



## Adopting the right approach to automation.

As game-changing as this automation promise is, there's a challenge to overcome: digital adoption. The paradox is that, while sales process automation within CRMs will make many marketers' jobs easier, there needs to be buy-in and understanding at the user level on how to set up that automation.

In order to do this, CRM software stakeholders need visibility into user behavior to understand friction points, where users fall off in a process, and where errors in form-fills occur. This data can then be leveraged to identify when and where automation can enhance user experience and improve data integrity.

In a recent Harvard Business Review Analytic Services report, over half of respondents said they interact with up to nine digital touchpoints each day, while Futurum Research puts that number at 14 on average. Therein lies the true challenge, because, as that report explains, "as many as 54 percent of companies have reported employee resistance to digital adoption in general, caused by several factors, ranging from anxiety about having to learn new things to overly packed work schedules."

The answer, then, is rooted in implementing a frictionless digital adoption solution. One that can course-correct on the fly by enabling employees with in-app guidance, user engagement, and process automation to optimize their experience and performance.

# Digital adoption will become an essential factor in the CRM equation.

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**There's a clear challenge to overcome: ensuring sales teams can make the most of the CRM technology in front of them.**

Getting this right is pivotal to a company's growth and evolution. McKinsey suggests that market leaders can expect a 2 to 5% bump in sales if they can make the most of the data-driven decision-making now available to them, while outperformers are 62% more effective than their competitors in using digital tools.

So there's a clear challenge to overcome: ensuring sales teams can make the most of the CRM technology in front of them. One solid solution is the enactment of a 'digital adoption strategy' - or, in other words, a tech solution that can assist in onboarding and training, alongside the ability to monitor internal usage analytics.
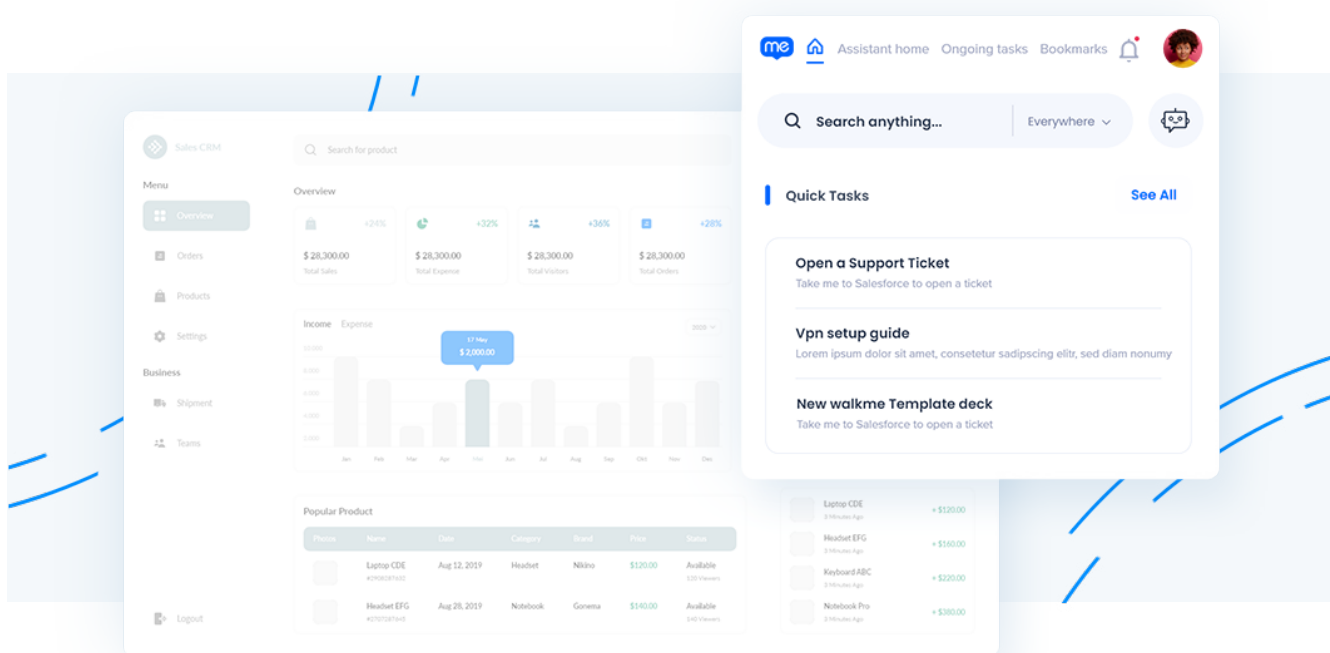


## Key stats:

**200**
The number of apps in an average enterprise tech stack.

**42%**
of organizations cite a lack of technical skill as their main digital transformation issue.

**2-5%**
sales bump for organizations who master data-driven decision making.

## Becoming an 'outperformer'.

A Digital Adoption Platform (DAP), which sits as a layer over the traditional CRM, can analyze and understand how sellers actually use their CRMs, and generate actionable insights. Those insights can be used to both automate routine business processes and increase the adoption of any tricky-to-learn CRM features.

Those are benefits being felt by many of the enterprises that we at WalkMe have partnered with. "We have to see the adoption rates go up," says Jeff McKittrick, former Vice President of Sales Business Capabilities at Hitachi Vantara, speaking about the need for better CRM adoption in the enterprise sales space. "We have to see people putting better data in. We have to see that the investments we're putting into the tools are actually paying off, through sales productivity, improved margin return, or a better customer experience."

Thankfully, the results of a successfully implemented Digital Adoption strategy speak for themselves when it comes to sales enablement. Having employed WalkMe's DAP solution, Hitachi Vantara saw an 88% increase in the adoption rate of its digital sales tools. McKinsey's data on the subject, meanwhile, reveals that companies with a DAP (what it calls an) "analytics center of excellence," are 1.4x more likely to be classed as 'outperformers' in their market.

The insight and data analysis offered by intelligent digital adoption tools will be key to unlocking your CRM's full potential – driving sales as a result.

# Social engagement will open the door to new customers.

## Exploring social media's evolving importance in the sales funnel.

Despite often headline-grabbing concerns around privacy and mental well-being in recent years, social media use continues to rise – especially amid a global pandemic, where connections are being sought via new mediums. Rising star, TikTok, got more traffic than Google in 2021. DataReportal research points to there being 400 million more social media users in 2021, bringing the global total to roughly 4.55 billion. With a global audience to be had, sales teams are turning to social platforms in droves. CRM suites have caught on to this trend and are keen on developing new integrations.

Social generates leads, so sales teams need to ensure their omnichannel approach is firing on all cylinders. Aa significant trend will be the continued evolution of how social media is further wrapped into the CRM sales cycle.

As with greater personalization mentioned earlier, the demand for this evolution is there on both sides. In its sixth annual State of Marketing report, Salesforce found that a huge 69% of customers now expect a connected experience that spans every touchpoint they interact with.

Those providing that experience are thriving: As of 2021, 81% of surveyed sales and marketing teams have synced social media with commerce systems, while high-performing brands were found 1.2x more likely to have increased their use of social sales tools through 2021 than their competitors.

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> **Social generates leads**, so it's important for sales teams to ensure their omnichannel approach is firing on all cylinders.

**Key stats:**

# 400m
more social media
users in 2021.

# 81%
of sales and marketing teams
are now syncing social media
with commerce systems.

# 62%
of brands are using
social media primarily
for social listening.

## Turning antagonists into advocates.

Currently, as reported by HubSpot, the biggest use for social media in sales and marketing strategies is social listening – more so than for proactive outreach. Social listening is a foundational way to get a read on a particular audience (helping to drive personalization), but it's also the best way for teams to turn a naysayer into a customer—a strategy HubSpot sees as being intrinsically linked with smart use of socially linked CRM features:

"By viewing social media and CRM together, companies gain a more powerful overview of what people are posting about on social media," says HubSpot's Lucy Fuggle, "as well as a clearer understanding of brand sentiment. If organizations can use social CRM to respond to comments quickly and thoughtfully, they can build stronger relationships with existing and potential customers and incorporate more user feedback into their roadmap."

This thinking is what's driving the rise in social CRMs like Sociality, Sprout Social, and Nimble, while social channel integration will only become increasingly prevalent in the big players like Salesforce and HubSpot as we move through 2022. Accordingly, Capterra's research shows that social media prospecting monitoring tools have become the most desired CRM features for driving major customer satisfaction results.

# Increased CRM mobility will drive productivity.

## Take action from anywhere.

To say that it's been a transformative two years would be an understatement. COVID-19 has ushered in huge changes for every industry, enterprise, and department, and it looks like many of those changes are here to stay.

The most notable change is the move to remote working, a truly tectonic shift in work's genetic makeup. In 2021, Salesforce found that of representatives from over 8,000 sales and marketing organizations, 82% are adopting new policies around remote work. And, in the wake of the pandemic, that's now become an expected shift.

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> **Emerging data shows how mobile-first CRM tools and CRM mobile apps can improve a host of enterprise metrics.**

It's not just about being at home, but rather the traditional computer-and-desk setup becoming less important. In CRM, we'll see a big shift towards mobile that will enable a more always-on, 'work from anywhere' ethos.

Salesforce's research suggests that the three biggest things set to impact sales teams are all about a change in the screens we work on: an expanded online population, 5G, and virtual reality. Recent announcements around the latter, including Facebook's rebranding to Meta, will only expedite these changes.

## Key stats:

**82%**
of sales and marketing organizations are adopting remote working policies.

**43%**
improved chance of meeting sales targets with a mobile CRM.

**14.6%**
growth in productivity after adopting a mobile CRM.

## The link between increased mobility, productivity, and sales.

The global market for mobile CRMs, available and fully functional on smartphones and tablets, is set to grow by around 13% year-over-year until 2029, at which point it will reach an estimated $52 billion.

Emerging data shows how mobile-first CRM tools and CRM mobile apps can improve a host of enterprise metrics. A study by Nucleus Research found that sales teams are, on average, 14.6% more productive when armed with a mobile CRM, while Active Campaign states that 65% of those using a mobile CRM consistently reach their targets – compared to just 22% for desktop-only users.

That's due, in part, to evolving customer expectations. Finances Online states that 85% of Facebook users now expect a response from companies within six hours, while 64% of Twitter users expect one within just 60 minutes.

In other words? Agility is key; being able to access CRM software, monitor customer activity, and act without the laptop is going to become an increasingly important facet of sales strategy.

# In summary...

**Effectively mastering everything that CRM suites have to offer is what will separate the outperformers from the stragglers.**

Sales-focused AI can sift through enormous data sets to provide unparalleled personalization when it comes to customer reports, lead scoring, and offers. Machine learning is ready to tackle the routine tasks that have traditionally drained employees of their capacity – freeing up precious time that could be better used on generating sales.

Meanwhile, CRM suites have left the confines of the office and are now on the screens in our pockets – bringing new meaning to the phrase 'always on' – and they're transforming the social platforms people love to live in into powerful new sales channels. However, unlocking all this promise requires a thoughtful approach to user adoption. It'll be more important than ever for sales operations leaders and executives to feel actively empowered through a curated digital adoption strategy. In doing so, they'll transform their CRM suite from a potentially untapped resource into a truly next-generation sales powerhouse.

## About WalkMe for Sales

Complex sales processes, poor data integrity, and lack of user knowledge slow the sales velocity of enterprise organizations. WalkMe has the unique ability to analyze and understand CRM applications, providing automated, actionable insights that drive sales adoption and optimize experience, performance, and revenue.

Only WalkMe gives sales organizations the data they need to see who is using CRM applications and how, as well as the ability to course-correct on the fly using in-app guidance, engagement, and process automation, all while empowering forecasting.

With WalkMe, take the struggle out of your CRM, and keep on celebrating your wins.

For more information, please visit our website at:  www.walkme.com

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