

## **Sales Performance Optimization: 2011 Key Trends Analysis**



### **What's the Key to Success In 2011?**

**Compliments of:**



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## 2011 Sales Performance Optimization Study Demographics

The following report is based on data collected from over 2,000 companies that took part in CSO Insights' Sales Performance Optimization (SPO) study. Each year we analyze the challenges facing sales organizations, why the problems exist, and what best practices can be leveraged to successfully overcome the issues. In total, we collect over 100 metrics related to sales performance that we use to conduct an analysis on the health of the world of sales.

Our initial objective is to collect input from a broad range of companies. We also obtain metrics to segment the data and create custom benchmarks for our research clients. For example, we ask study participants to identify the type of company they represent. Figure 1 shows a breakdown at the highest level: Manufacturing, Services and Other firms (including Non-profits, Education, Distribution, Retail, Government, etc.).

**Vertical Industry Make-up of Participants**

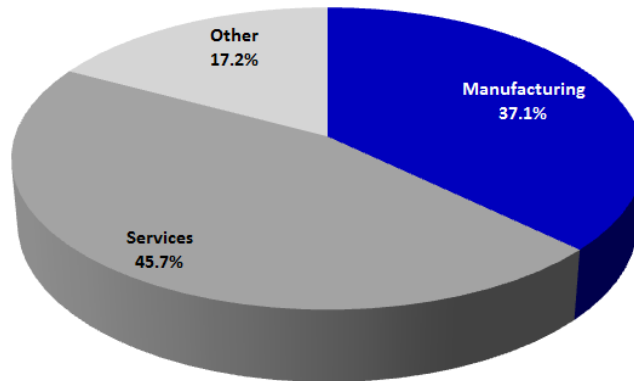


Figure 1

Because of the large participation base this year, we were able to produce [segmented analyses](#) for the following vertical industries:

- Advertising/PR/Media Firms
- Banks: Commercial & Retail
- Distribution Firms
- Insurance/Brokerage Firms
- Manufacturing–Tech
- Manufacturing–Non-Tech
- Medical–Pharma
- Medical–Devices/Equipment
- Professional Service–Business
- Professional Services–Tech
- Software Firms
- Telecommunications Firms

The size of the companies taking part in the study was segmented by two factors. The first was total revenues. This year, 42.3% of the companies were small businesses, 31.3% medium-sized companies, and 26.3% large enterprises. We produced segmented analyses for each of these three groups.

The second method used was segmenting by the number of salespeople the companies employed as shown in Figure 2.

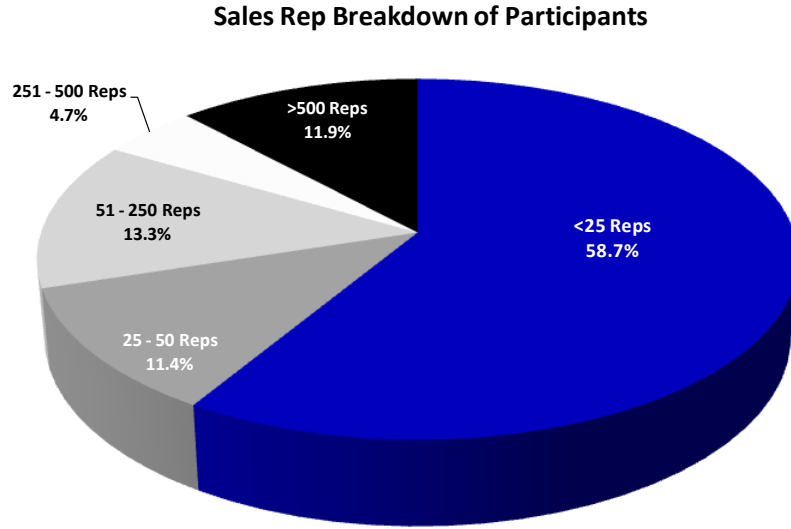


Figure 2

As in the past, we collected the data from a 20 minute online survey. Participants had the option to exit the survey and return where they had left off if they needed to get more information or ran into a time constraint.

The participants were individuals in line or executive management positions, thus ensuring that the input was from individuals who had a company-wide view of their sales organizations' performance.

Research clients interested in receiving custom analyses of the study data should contact their [CSO Insights](#) analyst.

## The 2010 Rebound and the Contributing Factors

As we ended 2009, we witnessed the largest single year drop in the percentage of reps making quota and in the percentage of overall revenue plan attained in the sixteen year history of our study. Yet that did not stop 85% of the firms from raising quotas for 2010, albeit somewhat less aggressively than in past years.

Based on the fact that 48% of the firms surveyed reported that they were concerned about making their 2010 revenue targets, we were anxious to see how they did this past year. The answer was that sales professionals, reps, and managers responded to the challenge and generated the single largest increase in the percentage of reps making quota and in the percentage of overall revenue plan attained in the now seventeen year history of our study, as illustrated in Figure 3.

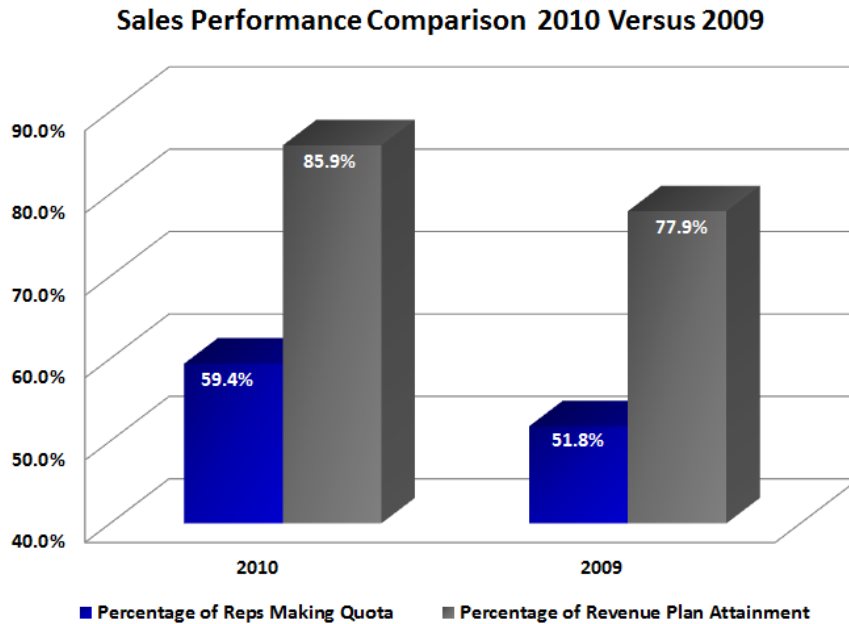


Figure 3

So what contributed to this strong turnaround? We found a number of factors that impacted sales performance to the positive and a couple of items that remain as concerns. We will briefly introduce these trends in this report. The 2011 SPO Topical Reports will go into more detail on each of these subjects.

- 1. Sales Turnover Rates is Down Again:** As you will see in the 2011 SPO Hiring and Compensation Analysis, sales rep turnover dipped down, yet again, to an all-time low of 25.7% (13.2% involuntary turnover—the rep is let go, 12.5% voluntary turnover—the rep leaves). Two factors are at play. First, many companies used 2009 as the time period to get rid of underperforming reps, so the talent base of the sales force was higher in 2010, requiring less firing. Second, hiring additional reps didn't happen at the rate companies projected, so there were fewer openings to lure away productive reps. [Note: A word of caution. Looking back at the 2004-2005 SPO study data, we noted a significant spike in voluntary turnover when the recovery hit its full stride and companies increased the size of their sales forces.] So a question to ask is, "What is my exposure to losing productive reps if my competitors start hiring?"

2. **Sales Training Investments and Quality are Increasing:** In 2009, investments in training salespeople decreased by 13.5%. In 2010, this trend reversed and investments increased by 9.5% per rep. But more importantly, the quality and diversity of the training increased. Many companies went beyond offering courses on sales skills and products and added training for understanding the customer's marketplace, justifying the cost of their products or services, and utilizing technology to help them sell. Training for sales managers also showed improvement. Ensuring that reps were taught the skills necessary to sell in a tough economy paid big dividends, as they were able to apply these skills to find more deals in 2010. Details on the impact of training are covered in more depth in the 2011 SPO Sales Process Analysis.
3. **Researching Accounts is Improving:** Two changes in the buying process continued in 2010. First, companies invested in solutions that showed they could help the firm achieve gain or remove pain. Second, the final decision to buy was more often made by a group of stakeholders (see the 2011 SPO Sell Cycle Analysis) versus a single individual. In the 2011 SPO Sales Strategy Analysis, we see that sales reps were more effective in researching both accounts and individuals within those accounts. This was supported by robust enhancements in Sales Intelligence services that provided reps with the equivalent of a digital research assistant that would constantly search the Internet looking for key trends, news, and events related to the accounts they were targeting, providing insights needed to start more sales cycles, and develop compelling cases for why their prospects should buy.
4. **Marketing and Sales are Still Not Aligned:** To support sales, marketing upped their game a bit in 2010. As you will see in the 2011 SPO Sales and Marketing Alignment Analysis, marketing picked up more of the burden for lead generation for sales. But as you will note, optimizing sales and marketing alignment still has room for improvement. Issues such as agreeing on what a "real" lead looks like, ensuring that the company's website supports the messaging sales is presenting to prospects, making sure leads get incubated when a qualified prospect needs to hold off on its evaluation, etc., are all areas that need more time and effort put into improving.
5. **Win Rates are Still Low:** One area that did not show signs of improvement in 2010 was the close rate of forecast deals. As we explored in the 2011 SPO Sell Cycle Review Analysis, win rates are near all-time lows. This trend points to the fact that the main contributor to sales success in 2010 was that reps worked harder rather than smarter. We commend them for their increased efforts, but in looking at the quota increases implemented in 2011, salespeople are going to have to find and close more opportunities. This is going to put more of a burden on sales managers to improve how they coach and mentor their sales teams.
6. **Understanding the Buy Cycle is Improving:** One trend highlighted in the 2011 SPO Sales Execution Analysis that may contribute to higher win rates in 2011 is the improvement in sales teams' understanding of the customer's buy cycle. With access to a wealth of product and pricing information on the Internet, from your website, those of your competitors, blogs, social media, etc., prospects can start their buying process without talking to a rep. When conversations do occur, companies want problem/solution discussions versus feature/benefits. More companies are investing the time to understand the shifts in the prospect's buying behavior and its implications on how they can effectively sell. As this becomes clearer, these insights will help sales teams reduce competitive losses and no decisions and get win rates back up to their previous highs.
7. **Cross/Up-Selling and Introducing New Products are Improving:** After years of witnessing decreases in selling effectiveness in cross-selling and up-selling and success in introducing new products, the tide turned in both of these aspects of selling (see 2011

SPO Account Management Analysis). During the past two years there has been an increased reliance on obtaining business from existing customers. To meet future growth targets, reps need to increase average deal sizes and solidify relationships with clients to ensure that they will purchase more products and services from them.

8. **Core CRM Adoption is Increasing:** To support the objectives outlined in number seven above, leveraging technology is needed. As you will see in the 2011 SPO Core CRM Analysis, not only are more companies implementing core CRM applications (e.g., [salesforce.com](http://salesforce.com), [Microsoft](http://Microsoft), [Oracle](http://Oracle), [SugarCRM](http://SugarCRM), [SAP](http://SAP), etc.), but they are seeing more of the salespeople leveraging these solutions in their daily workflow. One thing that core CRM allows is sales reps to mine insights into their territories. When a new product is launched, reps can more easily identify which of their prospects and customers to call. Companies are reporting increases in sales rep efficiency which is helping them match the right accounts to offerings.
9. **CRM 2.0 is Increasing Effectiveness:** Increases in companies enhancing their core CRM platform with new, complementary technologies is being evidenced (see the 2011 SPO CRM 2.0 Analysis). 2010 saw increases in companies implementing Sales Collaboration, Lead Generation Management, Sales Knowledge Management, and Sales Intelligence applications. In the benchmarking we have conducted on dozens of these types of initiatives, technology increases sales rep effectiveness in the form of higher win rates, increased margins, shorter sales cycles, etc. Another trend is the beginning of a wave of iPad/TabletPC adoption, thereby taking CRM on the prospect call. For a briefing on the new advances in technology, research clients should contact their [CSO Insights](#) analyst.
10. **Sales Management Adopting Sales Process is Improving:** Efficiency and effectiveness improvements were seen across the ranks of sales managers, as profiled in the 2011 SPO Sales Management Analysis. One area of improvement was more companies moving away from random sales processes to bringing more rigor to the way they sell. A key aid in making this transition is the increased adoption of Forecast Management and Sales Analytics technology. The early adopters of these applications are seeing their managers become more adept at proactively knowing which reps to mentor and coach on specific deals. As a result, they are more effective in modifying the sales process when changes in the marketplace occur, and in doing so they are increasing their win rates. As more of these successes are seen, investments in optimizing sales management performance will increase in the coming year.

## Meeting or Beating Plan in 2011

With 2010 in the history books, what are the prospects for 2011? Many companies have set fairly aggressive revenue goals for this year. In the previous section we highlighted some of the key trends that contributed to sales success last year. There are lessons to be learned that can be applied to help improve performance this year. But as opposed to taking a tactical approach to improving sales effectiveness (find a problem and solve it, find a problem and solve, etc.), let us share with you a more strategic roadmap to success—not only for 2011, but beyond.

When we first published our sales effectiveness study in *Harvard Business Review* a few years ago, we focused on how a company’s level of sales process adoption can directly impact how they sell—positively or negatively. In the past three years, we expanded that analysis to not only consider how firms sell, but also the level of relationship organizations are able to achieve with the majority of their customers by introducing the concept of the SRP Matrix, as seen in Figure 4.

**Sales Relationship/Process (SRP) Matrix™**

Trusted Partner				
Strategic Contributor				
Solutions Consultant				
Preferred Supplier				
Approved Vendor				
	Random Process	Informal Process	Formal Process	Dynamic Process

Figure 4

As a quick review, the SRP Matrix has two components: 1) what value your customer perceives you are bringing to the table—your relationship; and 2) how you engage and work with your clients—your process. Within these two aspects of selling, companies fall into one of a few categories. For those of you who are new to our SRP Matrix concept, let’s explore relationships first.

We found that companies achieve one of the following five different levels of relationship with their customers and prospects in their marketplaces.

### Five Levels of Sales Relationships

- **Level 1—Approved Vendor:** You are seen by the majority of your customers as a legitimate provider of the products or services you offer, but you are not recognized for having any significant sustainable, competitive edge over alternative offerings.
- **Level 2—Preferred Supplier:** Based on your marketplace reputation and past dealings with your customers, while competitors may offer alternatives, you are normally seen as the preferred vendor with whom to do business.
- **Level 3—Solutions Consultant:** Based on a specific set of product-related, value-added insights or services you offer, your customers see you as not only a vendor, but also a consulting resource on how to best use your products or services.
- **Level 4—Strategic Contributor:** Above and beyond the products and services you offer, your customers view you as a source of strategic planning assistance for dealing with broader-based challenges they are currently facing.
- **Level 5—Trusted Partner:** At this highest level, you are seen as a long-term partner whose contributions—products, insights, processes, etc.—are viewed as key to your client's long-term success.

In addition, our past analysis has shown that sales organizations fall into one of four sales process levels when it comes to the practices they use to find, create, and expand customer relationships.

### Four Levels of Sales Process

- **Level 1—Random Process:** Your company may be perceived as being anti-process, though what you really lack is a single standard process. Essentially, sales reps do their own thing, their own way.
- **Level 2—Informal Process:** Your company exposes your salespeople to a sales process and indicates that they are expected to use it, but usage is neither monitored nor measured.
- **Level 3—Formal Process:** Your company regularly enforces the use of a defined sales process (sometimes religiously). You conduct periodic reviews of the process to see how effective it is and make changes based on that analysis.
- **Level 4—Dynamic Process:** Your company dynamically monitors and provides continuous feedback on sales reps' use of your formal sales process. You also proactively modify the process when you detect key changes in market conditions: new competitors emerging, changes in governmental regulations, shifts in the economy, etc.

For the purposes of the following analysis, we segmented all of the study participants by both factors: sales relationship and sales process levels. This allowed us to categorize respondents into one of the twenty quadrants in the SRP Matrix.

We then looked at the sales performance for each quadrant, focusing on the aggregated averages of four main sales performance metrics: percentage of sales reps making quota, percentage of overall revenue plan achieved, percentage of forecast deals resulting in wins/losses/no decisions, and annual sales force turnover rate. Turnover rate includes voluntary turnover, where reps leave on their own accord, and involuntary turnover, where they are let go.

**2011 Sales Performance Optimization – Key Trends Analysis**

Reviewing the results of this analysis using the data from the 2011 SPO study (which was consistent with findings from the research last year), we continue to see that not all companies are achieving the same results. In fact, the metrics surfaced three clear levels of sales performance as shown in Figure 5.

**Sales Relationship/Process (SRP) Matrix™ - 2011 SPO Survey Analysis**

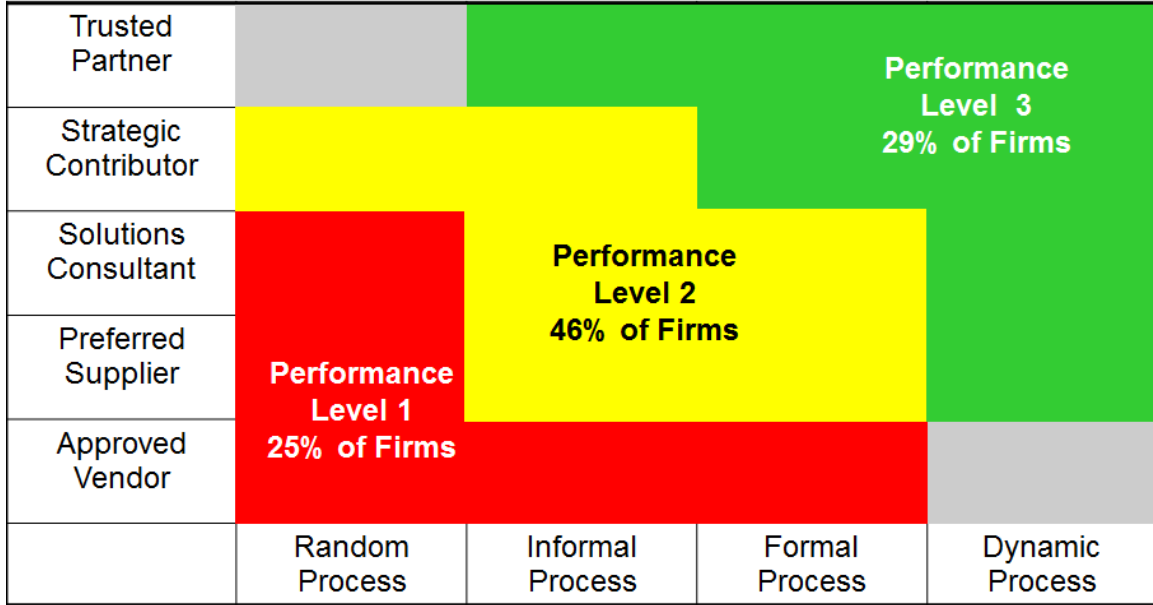


Figure 5

To start to investigate the findings of our analysis, let us first explain the gray quadrants in the matrix. Two things do not exist. While individual reps working for a Random Process sales organization may achieve the level of Trusted Partner with their clients, the company, as a whole, does not. Also, when a firm gets to the level of Dynamic Process it is at least able to achieve the status of Preferred Supplier.

When we looked at the other sections in the SRP Matrix, in relationship to (on average) how well the companies in each quadrant fared, we again found three distinct levels of sales performance. 25% of the sales organizations in the red section of the matrix had similar sales results in 2010, as did the 46% making up the yellow segment, and the 29% in the green area. Table 1 profiles these sales performance numbers.

Sales Performance Across Levels Comparison	Performance Level 1	Performance Level 2	Performance Level 3
% Reps Making Quota	55%	60%	65%
% Company Plan Attainment	82%	86%	90%
% Forecast – Wins	42%	47%	52%
% Forecast – Losses	34%	30%	27%
% Forecast – No Decisions	24%	24%	21%
% Sales Force Turnover	28%	26%	22%

Table 1

A key trend is that more companies jumped on the bandwagon in terms of getting out of the sales performance basement. In fact, the number of Sales Performance Level 1 firms decreased from 31% last year to 25% this year. At the other end of the spectrum, the Sales Performance Level 3 group grew from 23% in 2009 to 29% in 2010. In looking at the performance differences between these three groups, making a shift over in process and up in relationship has a significant payback.

In terms of moving from Sales Performance Level 1 to 2 or Level 2 to 3, we see a noticeable improvement in the percentage of reps making plan which, in turn, contributes to increases in overall company revenue plan attainment. The contributing factor is that win rates increase as companies move up between levels.

To put this in perspective, let's say that you are a Sales Performance Level 1 firm. You have a 100 person sales force, with each rep carrying a \$1M quota, and your average deal size is \$50,000. To make quota with a 42% win rate, a rep would need to generate 48 qualified opportunities in order to close the 20 needed to meet quota.

Now assume you were able to move to Sales Performance Level 2 and achieve the average results from this level. Now your reps would be closing 47% of those 48 opportunities, or 22.5 deals per rep, by lowering your competitive loss rate. The thing to consider is that you aren't finding more opportunities; you are selling more effectively to close an increased number of the opportunities you already found and were pursuing. Take this a step further and get to Sales Performance Level 3 and now your reps are each closing 25 deals.

So at the company level, moving from Sales Performance Level 1 to Level 2 nets your firm 225 more deals or a revenue increase of 11.25%. This increase can be achieved again by moving from Level 2 to Level 3.

- **What is Possible?** As you read each of the 2011 SPO Topical Reports, you will get a flavor of the factors that impact your organization's sales performance. We encourage you to make notes regarding the aspects of selling that you want to drill into to get an understanding of what "better" could mean for your sales force.
- **Where Are You Today?** CSO Insights offers an annual subscription which provides research clients with a benchmark analysis comparing their sales performance to their peer group. By walking through that analysis together, we can help companies see where they are on the SRP Matrix.
- **Where Could You Be in One and Two Years?** After reviewing the benchmark analysis, we can then help you understand the strategies and tactics that best-in-class companies have implemented and chart a transition path for where you could be on the SRP Matrix in one and two years.
- **What Needs to Change to Get There?** As companies have moved across the SRP Matrix, they quickly find that things change. In addition to adjustments to your sales process, you may need to change the profile of who you hire, how the reps are managed, trained, and compensated, what tools they need to use, etc. By knowing what you are trying to accomplish, we can tap into our best practices database to give you an idea of what to expect.
- **In What Order Should You Make Changes?** Sales transformation is about doing the right things in the right order. We can help you to do a "return on effort analysis" that assesses the value of making specific changes along with the effort required to do so. We can put you in contact with firms that have already gone down this path so you can understand all of the implications.

- **How Do You Demonstrate ROI?** Because we have done the initial benchmark, we can assess sales performance after each major phase of the overall sales transformation implementation and identify aspects of selling that have improved. This will allow you to show executive management what has been accomplished and surface what needs to be done next.

Work through the answers to these questions and you will be well on your way to years of sales effectiveness improvement. How far can you go? We highlighted John Williams' success story from when he was Senior Executive for Worldwide Sales, Marketing, and Support for StorageTek in our [Sales Management 2.0 eBook Volume 2](#). His sales transformation efforts took the company from \$700M to \$2.2B in four years. The extraordinary accomplishment in this endeavor was that it was all productivity gains, as John did not add any net-new salespeople during this time period.

It can be done.

If you are already on this path, we congratulate you. If you aren't, why not?

## 2011 SPO Study Analysis Overview

When you gather data from a couple thousand sales organizations, you have a wealth of information to analyze. The challenge is how best to present the insights surfaced from the survey. Last year we changed the format from producing a single 250 page report to “topical reports” focused on specific aspects of sales performance.

Based on the positive feedback, we are once again using this format. The following is a listing of the 2011 SPO Topical Reports and the typical metrics contained in each report.

- ❖ **Key Trends Analysis:** Major declines in the world of sales performance over the past year, what contributed to this drop in effectiveness, and insights regarding how and why some firms are outselling their peers through investments made in supporting sales teams, increasing process adoption and enhancing levels of relationship vendors have with their customers.
- ❖ **Sales Rep Hiring/Compensation Analysis:** Ability to hire successful reps, planned changes in the size of sales forces for 2011, voluntary and involuntary sales rep turnover, experience profiles of new hires, utilization of competency testing in hiring, average rep ramp-up time, average sales rep and sales manager compensation targets, ability to implement compensation programs to drive selling behavior.
- ❖ **Sell Cycle Analysis:** Average sell cycle length, number of calls required to close a deal, pipeline conversion rates (number of leads resulting in a discussion, discussions resulting in presentations, presentations and proposals that result in a sale), average win/loss/no decision rates, percentage of deals that close as forecast.
- ❖ **Sales Strategy Analysis:** The ability to target the right accounts to pursue, develop strategic account plans for key accounts, thoroughly research accounts prior to contacting them, generate enough leads, and properly qualify prospects and incubate leads that have interest but currently no time.
- ❖ **Sales Execution Analysis:** Ability to understand the customer’s buy cycle, effectively present features and benefits, differentiate from the competition, align solutions to customer’s needs, generate a proposal/bid/configuration, cross-sell/up-sell, sell value/avoid discounting, and close business. In addition, we review the key reasons why companies win and lose deals.
- ❖ **Account Management Analysis:** Ability to introduce new products, farm additional business from existing customers, effectively communicate with customers, renew business, create customer loyalty, and generate/maintain case studies and references.
- ❖ **Sales Management Analysis:** Ability to hire reps who will succeed, provide managers with timely and accurate sales metrics, accurately forecast business, calculate commissions, conduct win/loss reviews, adapt the sales process to changes in the marketplace, proactively identify which reps need additional coaching/mentoring, share best practices across the sales force, and manage the rate of change impacting sales reps.
- ❖ **Sales Process Analysis:** Percentage of firms using a formal sales process, their adherence to that process, analysis of sales organizations that develop their own versus licensing a commercially available methodology to support their process, analysis of which commercial offerings they use, and the overall impact sales process is having on their sales performance.

- ❖ **Core Customer Relationship Management (CRM) Analysis:** Percentage of organizations that have evaluated/implemented a CRM system, comparison of licensing a commercially available system versus building the application in-house, analysis of the impact that CRM is having on a sales force's ability to sell, and usage of outside resources to implement CRM systems.
- ❖ **CRM 2.0 Usage Analysis:** Adoption of additional CRM functionality including Sales Collaboration, Lead Management, Sales Management Analytics, Sales Knowledge Management, CRM/Sales Process Integration, and Social CRM. Also, a review on how the Internet and access to sales knowledge are being leveraged by sales.
- ❖ **Sales and Marketing Alignment Analysis:** How sales rates the level of support they are receiving from marketing in terms of the impact of the company's website, availability of sales tools/collateral, an assessment of the quality and quantity of leads generated by marketing, and the amount of time it takes for lead generation programs to start to generate sales.
- ❖ **2011 Going Forward:** A summation of lessons learned from this year's data and a seven-step road map outlining where and how to look for improvements in the coming year. Sneak peek: maintaining the status quo from 2010 is not an option.

To help you more effectively leverage the data and insights in each of the analyses as a basis to fine-tune your sales strategies and tactics, we recommend that you take the 2011 SPO survey if you have not done so. (Contact [CSO Insights](#) to secure the link to the online survey.)

In the 2011 SPO Topical Reports we often refer to other analyses, case studies, and white papers we have published on topics such as lead generation, sales process, sales management, CRM, sales effectiveness, best practices, etc. Research clients can access all of these related documents online via the [CSO Forum](#).

We hope the information in these reports will help you optimize your sales performance in 2011 regardless of the direction the economy ultimately goes. While we believe the issues raised have broad applicability, we encourage you to use this information simply as the basis for brainstorming, goal planning, and to identify and prioritize your organization's operational challenges. Everyone can benefit from understanding the strategies and tactics of other companies, but in the end, you have to implement solutions that fit your specific business needs, not those of other firms.

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## About the CSO Forum

The [CSO Forum](#) is an invaluable online resource for inspiration, ideas, and guidance on how to achieve excellence in sales.

The CSO Forum Library contains hundreds of articles on sales issues and thought leadership pieces, and it is constantly growing. Contributors include CSO Insights, with a seventeen year history of providing strategic and tactical thoughts and practical solutions, and a cadre of Advising Members whose years of experience in the trenches speaks for itself.

The CSO Insights Research section of the CSO Forum contains all of the metrics from CSO Insights' annual research projects including the full report for each study. In 2011, the results were based on the input from nearly 2,000 CSOs and sales executives who participated in the SPO study. These metrics provide you with real, relevant information for benchmarks, validation, and competitive intelligence.