

A woman in a yellow shirt is sitting at a desk, looking at a laptop. The laptop screen shows a video conference with several participants. The woman is holding a pen over a notebook. The background is a bright, blurred office space with a window.

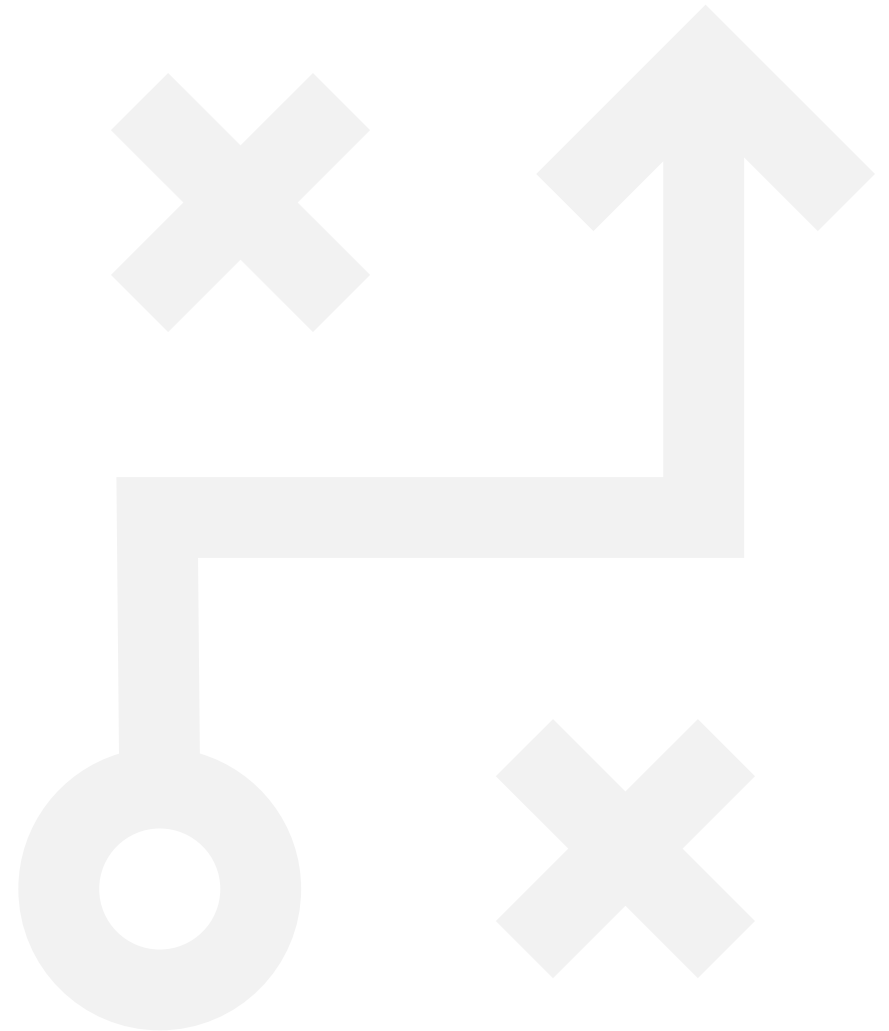
Gartner for Sales Leaders

# 2021 Strategic Virtual Selling Framework

Gartner for Sales Research Team

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Sales enablement leaders need a clear strategy to support the sales force in a virtual selling environment. Use this framework to review, align and enable virtual selling with new buying realities, including asynchronous and synchronous virtual customer engagement.



Chief sales officers (CSOs) are preparing for a more permanent shift to a virtual selling reality. In our CSO Priorities Pulse Survey (January to February 2021), CSOs reported they expect 58% of the sales force will remain operating virtual by the end of 2021 (up from 24% working virtually prepandemic). Looking beyond this year, over a third of CSOs reported they are permanently transitioning some or all field sellers to virtual roles, and another third are considering it. While a partial or fully virtual sales force can reduce cost of sales, this shift is also attractive to CSOs because of buyers' preference to complete B2B purchases digitally.

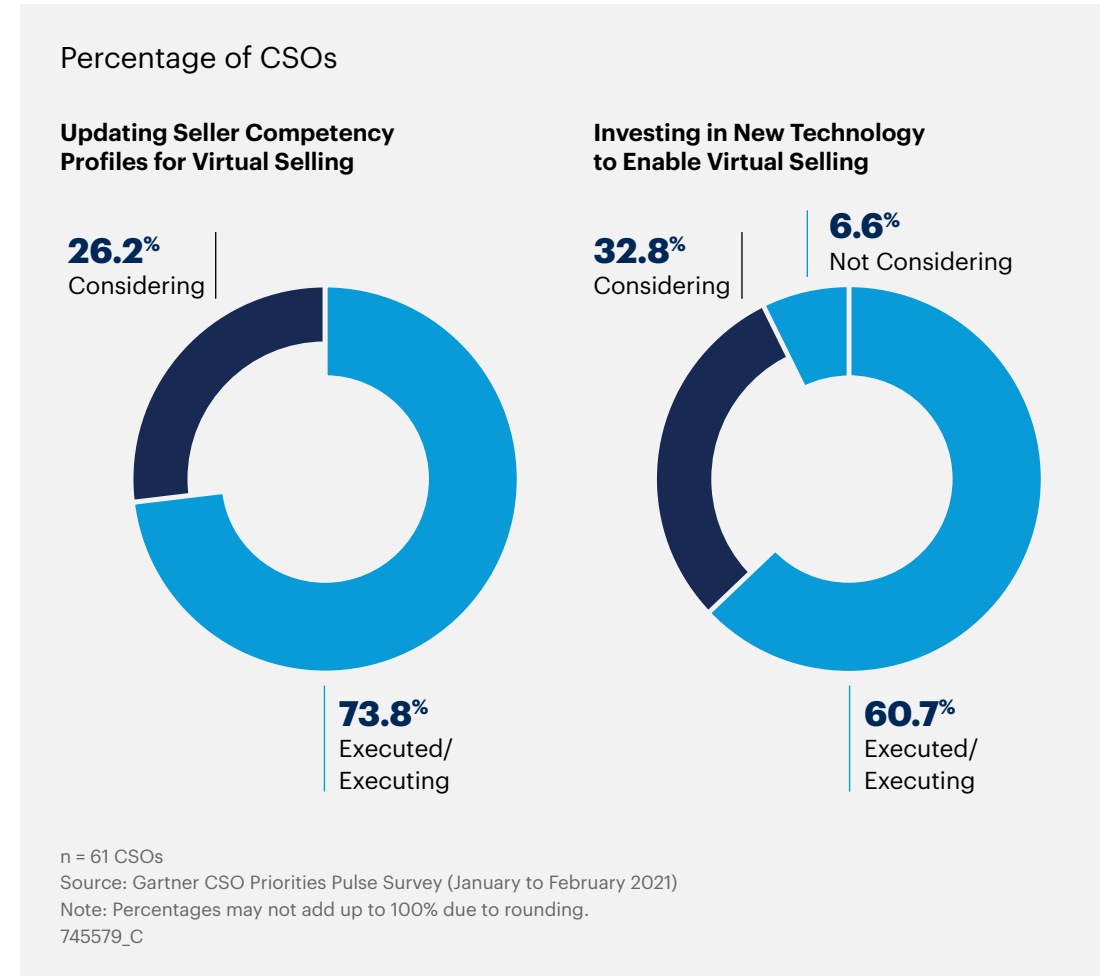
As a result, sales enablement leaders need to continue making investments in training, coaching and other resources to support sellers seeking to adopt an effective virtual selling approach. In fact, 74% of CSOs report they have recently or are currently updating their seller skills profile for virtual selling, and 61% of CSOs are already investing in new technology to enable virtual selling (see Figure 1).

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**As you build out your virtual selling strategy, it is important to fit your strategy into your organizational context and culture.**

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Figure 1: CSO Actions Related to Virtual Selling



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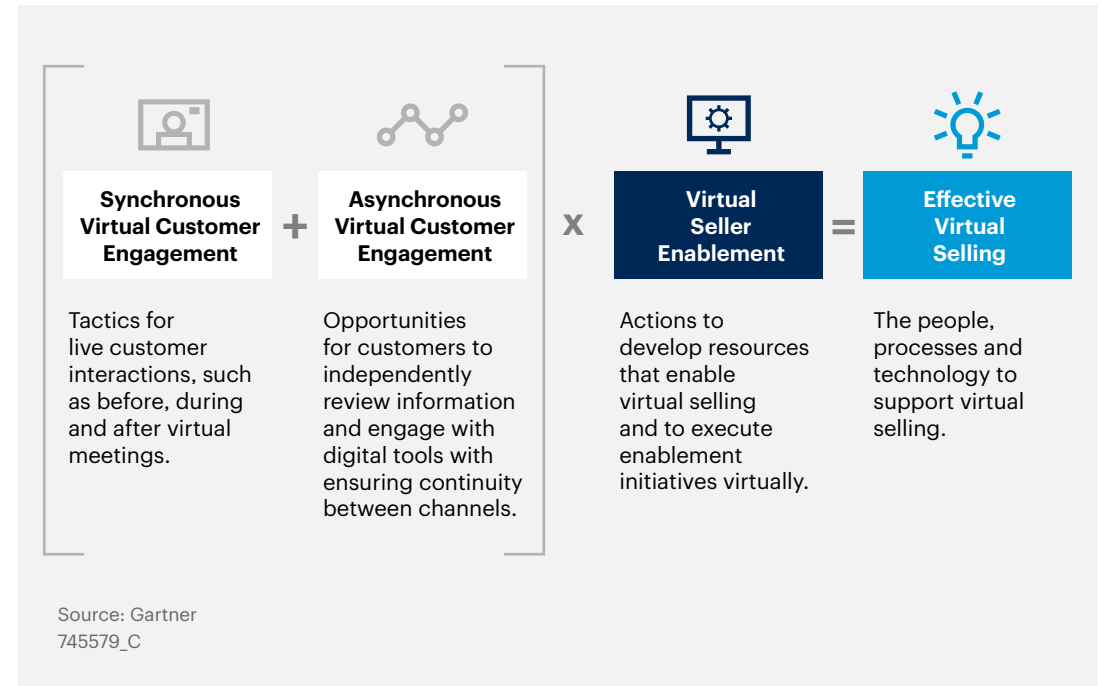
**Sales enablement’s guidance should emphasize the quality of a seller’s virtual customer interaction, regardless of whether it is a meeting or email, instead of seeking to maximize the quantity of a seller’s virtual customer interactions.**

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Key to a more permanent shift toward virtual selling is a shift in enablement strategy. Progressive enablement leaders realize sellers need to stop assuming live meeting practices transfer seamlessly to virtual settings, and they must prepare sellers to sustain digital-first selling behaviors. This research provides a framework to help sales enablement take immediate and plan longer-term actions to develop a virtual selling strategy along the following dimensions (see Figure 2):

- **Synchronous Customer Engagement** — This includes tactics for live customer interactions, such as premeeting planning, virtual meeting engagement and postmeeting follow-ups.
- **Asynchronous Customer Engagement** — This includes providing customers with opportunities to independently review information and engage with tools on supplier websites, microsites and so forth while ensuring continuity as customers transition between channels.
- **Virtual Seller Enablement** — This includes actions to develop resources that enable virtual selling and to execute enablement initiatives virtually.

Figure 2: Framework to Enable Effective Virtual Selling



## Synchronous Virtual Customer Engagement

Sellers that master the new strategies required to virtually engage will help distinguish themselves from their peers. In fact, 73% of B2B buyers say the winning supplier's seller for a purchase was either effective or highly effective at virtual meetings; just 2% were ineffective. However, to deliver virtual meetings effectively, they require greater coordination and different meeting facilitation skills compared to in-person meetings.

Sales enablement leaders must help sellers make critical changes to how they prepare for, facilitate and follow up after a virtual customer meeting (see Tables 1 and 2). This is necessary because compared to live meetings, in a virtual setting:

- Customers are likely to have lower attention spans.
- Customers' expressions, body language and other cues are harder to observe and track.
- Key decision makers and senior leaders may more often delegate virtual calls to junior contacts.
- Stakeholders may be more reluctant to share skepticism and challenge viewpoints, especially in a big buying group, making it harder to facilitate consensus.



Table 1: Short- and Long-Term Seller Actions for Synchronous Virtual Customer Engagement (Premeeting Planning)

Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<p><b>Virtual Meeting Strategizing</b></p> <p>Source: Gartner</p>	<p><b>Create Pre-call Plan:</b> Develop a pre-call plan (PAO) to establish expectations for the –</p> <ul style="list-style-type: none"> <li>• Purpose (of the meeting)</li> <li>• Agenda (three to five words per bullet)</li> <li>• Outcome (that drives towards the next step). For more information, see Remote Meeting Fundamentals.</li> </ul> <p><b>Set Meeting Cadence Expectations:</b> Set and communicate expectations about shorter but potentially more frequent meetings.</p> <p><b>Define Call Participant Roles:</b> Identify the colleagues to invite for an upcoming meeting with tightly defined roles for each seller, manager or specialist to maximize limited customer time.</p> <p><b>Find Best-Fit Subject Matter Expert Deal Support:</b> Use the remote setup as an opportunity to selectively deploy geographically dispersed, high-quality experts and specialists for complex and high-value deals.</p> <p><b>Execute Pre-call Customer Planning and Run Role-Playing Exercises:</b> Schedule a call planning session to coordinate with colleagues joining the customer call, and as appropriate, role-play select interactions to anticipate and strategize for likely roadblocks.</p>	<p><b>Determine Value of Live Virtual Interactions:</b> In a hybrid setup of in-person and virtual interactions with clients, prioritize virtual interactions for an agenda that would best be supported by remote specialists and geographically dispersed customer or supplier teams.</p> <p><b>Host Remote Meetings for Major Project Milestones:</b> Use remote meetings to facilitate major milestone events so you can ensure maximum customer participation. Save in-person meetings for coordinating and executing on targeted, intermediate milestones with relevant customer stakeholders.</p> <p><b>Assess Customers' Digital Footprint:</b> Review asynchronous customer activities on platforms such as customer microsites and digital sales rooms to –</p> <ul style="list-style-type: none"> <li>• Inform meeting agendas and provide recommendations that push deals forward.</li> <li>• Inform the creation of new content and improve the content usage by sellers and customers during live meetings.</li> </ul>

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Table 1: Short- and Long-Term Seller Actions for Synchronous Virtual Customer Engagement (Premeeting Planning)

Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<p><b>Stakeholder Identification and Engagement Planning</b></p> <p>Source: Gartner</p>	<p><b>Confirm Participants and Meeting Agenda:</b> Informed by the PAO, highlight the intent or purpose of the meeting with customers in advance of the call to target appropriate stakeholders, validate the plan, solicit additional topics and confirm participation by senior stakeholders who may delegate virtual sales calls to junior contacts.</p> <p><b>Identify and Collaborate With Mobilizer(s):</b> Identify Mobilizers in the buying group who will be advocates for you within the customer organization. Partner with them to encourage the buying group’s participation during meetings using our Stakeholder/Mobilizer Identifier Toolkit.</p> <p><b>Create Conversation Roadmap:</b> Prepare talking points and a plan of action to —</p> <ul style="list-style-type: none"> <li>• Invite inputs from stakeholders other than primary contact or decision makers</li> <li>• Proactively seek information about and introduction to additional stakeholders who should be involved</li> </ul> <p><b>Generate Hypotheses to Prepare for Meeting:</b> Hypothesize potential conclusions and questions customers might bring to the meeting. Also, hypothesize topics, goals and transitions to prepare a conversation path, to develop customer prompts to provide context for questions, and to help the meeting attendees arrive at a common understanding about the information shared in meetings.</p>	<p><b>Select Customer Stakeholders to Invite to Meeting:</b> In a hybrid setup, determine whether a customer stakeholder must be present in an in-person buying group meeting or can be engaged in a separate virtual meeting or asynchronously. This decision can be made by mapping stakeholders’ roles and levels of influence in the buying group as well as their communication preferences.</p> <p><b>Find Best-Fit Channel to Engage Stakeholders:</b> Determine the best-fit synchronous/asynchronous channel (e.g., email, text, social media, customer microsite, live meeting, etc.) to engage customers across all customer touchpoints with a supplier during a purchase. Stay attuned to customer communication preferences, and track changes in customer preferences on an ongoing basis to regularly revisit channel selection.</p>

Table 2: Short- and Long-Term Actions for Synchronous Virtual Customer Engagement (During Meeting and Meeting Debrief)

Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<b>Establish Agenda for Meeting</b>	<p><b>Share Narrowly Scoped Agenda and Prioritized Meeting Topics:</b> Begin meeting by communicating a narrowly scoped agenda and desired outcome(s) with a few, clearly defined objectives, informed by the precall plan (PAO). Prioritize information that requires stakeholder inputs and/or approval to move conversations forward.</p> <p><b>Prioritize and Adapt Content for a Virtual Format:</b> Thoughtfully create shorter, bite-sized data and content in appropriate formats for 30-, 45- or 60-minute virtual meetings to ensure comprehension and respect for time commitments.</p>	<p><b>Improve Meeting Management:</b> In a hybrid setup of remote and in-person meetings, sellers should –</p> <ul style="list-style-type: none"> <li>• Share a recap of the last discussion at the start of each meeting to ensure continuity between meetings, since some stakeholders may not be present in all meetings.</li> <li>• Anticipate and proactively manage tangents in a discussion, which is more likely to occur in remote, larger group meetings.</li> </ul>
<b>Stakeholder Engagement During Meeting</b>	<p><b>Encourage Customer Stakeholder Participation:</b> Intentionally use pauses in the meeting to compel customer participation and to check for comprehension and attention; engage Mobilizers to help drive discussion forward.</p> <p><b>Increase Stakeholder Involvement:</b> Drive planned and purposeful involvement of various customer stakeholders’ opinions (beyond the primary point of contact).</p> <p><b>Incorporate Collaboration Tools:</b> Use different collaboration technologies, especially when meeting with larger groups, such as whiteboarding, mind mapping and polling tools to alleviate virtual meeting fatigue, reduce the barrier for participation and encourage active collaboration.</p>	<p><b>Create a Digitally Immersive Customer Experience:</b> To create a more engaging and dynamic experience in a hybrid setup of remote and in-person meetings —</p> <ul style="list-style-type: none"> <li>• Leverage available technology to conduct virtual product demos.</li> <li>• Record and share customized videos.</li> <li>• Share fillable forms or calculators.</li> </ul>
<b>Debrief With Key Stakeholder(s)</b>	<p><b>Debrief With Mobilizer(s):</b> Assess stakeholder engagement in a call debrief with Mobilizer, and create a plan to facilitate consensus.</p> <p><b>Debrief With Senior Stakeholder(s):</b> End the call five minutes early and request the senior customer stakeholder remain on virtual platform with the sales leader to discuss progress.</p> <p><b>Send Follow-Up Email and Share Next-steps:</b> Ensure agreement and clear expectations on next steps, which are promptly sent as a follow-up email.</p>	<p><b>Drive Cross-Functional Collaboration:</b> In addition to customer stakeholders, work with your sales manager to identify and help broker appropriate marketing and service relationships. Leverage these cross-functional colleagues to better execute on postmeeting action items and create a truly consistent supplier experience.</p>

Source: Gartner



## Asynchronous Virtual Customer Engagement

According to our 2021 Digital Buying Survey, B2B customers report spending more than one-fourth of their time engaging the winning supplier in a purchase decision through asynchronous exchanges (e.g., via email, text, social media, microsites, voicemail, and so forth). Clearly, sellers today must master asynchronous engagement to be successful.

Mastering asynchronous engagement requires sellers to effectively connect with customers outside of in-person meetings (see Table 3). Sellers should use asynchronous engagement to both ensure customers independently

review information on supplier websites and customer microsites as well as drive continuity in the buying experience as customers move between channels. This type of engagement is necessary because in the current sales environment:

- Customers have become fatigued by virtual meetings.
- Customers want answers to their questions on-demand.
- Customer requests can often be addressed quicker without live meetings.

Table 3: Short- and Long-Term Seller Actions for Asynchronous Virtual Customer Engagement

Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<b>Channel Selection</b>	<b>Select Interaction Method:</b> Before scheduling a virtual meeting or phone call, consider whether an asynchronous engagement would be more effective.	<b>Prioritize Asynchronous Engagement:</b> In a hybrid set-up of in-person and virtual interactions with clients, use synchronous engagement first to resolve most customer problems and reserve synchronous engagement only for situations clients would define as "high value" and when problems cannot be resolved asynchronously.
<b>Content Management and Sharing</b>	<p><b>Share Buyer Enablement:</b> Share high-quality digital content aligned to key customer jobs during a purchase process (e.g., buyer enablement) to help customer stakeholders socialize ideas and drive action asynchronously.</p> <p><b>Record and Share Simple, Custom-Made Videos:</b> Record and share with customers short videos of seller presentation voiceovers and customer testimonials.</p>	<p><b>Curate and Reconcile Conflicting Information:</b> Create and continually update a repository of information resources customers are likely to review and help customers reconcile contradictory content.</p> <p><b>Centralize Follow-Up Materials Online:</b> Using a secure webpage or a cloud file storage solution, centralize follow-up materials to make them easy for customers to access and also for your organization to track the customer's "digital footprint."</p>
<b>Ongoing Collaboration</b>	<p><b>Use Cloud-Based Documents:</b> Rather than sharing a static document or email attachment, share a cloud-based and editable document that can be automatically updated to reflect seller or customer changes and comments.</p> <p><b>Leverage Collaboration Instant Messaging Capabilities:</b> Create an online messaging space (e.g., Microsoft Teams or Slack channel) where customers and sellers can connect to share short and quick updates and address issues that do not require detailed emails or a virtual meeting.</p>	<b>Ensure Multichannel Alignment:</b> Regularly track customer interactions to ensure alignment between communication through in-person and digital platforms, and ask questions to determine customer perceptions of experience consistency as leading indicators of deal challenges.

Source: Gartner

Table 4: Short- and Long-Term Actions for Sales Enablement Leaders to Enable Effective Virtual Selling

Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<p><b>Sales Enablement Technology Investment</b></p>	<p><b>Evaluate and Implement Additional Capabilities of Existing Technologies:</b> Before purchasing new technology to support virtual selling, carefully assess existing technologies and digital tools to understand and maximize additional functionalities.</p> <p><b>Regularly Review Existing Tech Stack for Relevance:</b> As business needs and customer expectations change, selectively retire technologies that no longer match these needs or are redundant and have low utilization.</p>	<p><b>Develop Guided Selling Capabilities:</b> Develop AI-based guided selling capabilities to help manage the full pipeline, from lead development to helping sellers capture buying signals and sentiment that are lost using traditional selling methods.</p> <p><b>Use Conversation Analytics to Support Coaching:</b> Provide managers access to AI-based conversational analytics to track the share of speaking time on a call between seller and customer, words and questions asks, and the ability for managers to search past calls based on keywords and topics. Afterward, a seller and manager can use this technology to further refine a seller's virtual meeting facilitation skills.</p> <p><b>Invest in High Impact Coaching Technology:</b> Select coaching technology that reduces manager effort and maximizes the quality of manager-seller coaching interactions, rather than trying to replace it.</p> <p><b>Explore Digital Sales Rooms:</b> Prepare your organization to embrace digital sales room technology as it becomes available so sellers can effectively engage customers asynchronously. Digital sales rooms are an evolution of the microcontent pages and customer portals that have built-in virtual meetings and dynamic content creation capabilities, customer engagement analytics, and augmented or virtual reality and visual configuration tools.</p>
<p><b>Onboarding Design and Deployment</b></p> <p>Source: Gartner</p>	<p><b>Offer Recorded Trainings to Accelerate Onboarding Completion:</b> Deploy learning based on predetermined onboarding milestones to build foundational knowledge, such as product features and benefits, and “hard skills” training that does not require a live instructor, such as system and tool training.</p> <p><b>Curate Onboarding Resources:</b> To minimize information overload for new hires, prioritize digital content that delivers the most critical knowledge needed for a fast start, such as prospecting templates, product information, sales process basics and so forth.</p>	<p><b>Develop Hybrid Onboarding Programming:</b> In a hybrid setup of in-office and remote work, rethink timing and promote live onboarding sessions to accelerate new hire collaboration and networking opportunities, while reserving asynchronous channels for onboarding activities sellers can complete independently.</p>

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Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<p><b>Training Sellers and Managers on Virtual Selling Skills</b></p> <p>Source: Gartner</p>	<p><b>Create Short Training Modules:</b> Design and deliver short training modules that can be completed either synchronously (with a live facilitator) or asynchronously (e-learning) with application exercises to avoid training burnout and maximize learning engagement.</p> <p><b>Design Training for Complex Topics:</b> Host live (virtual) sessions to help sellers with more complex concepts, keeping class sizes manageable enough to drive participation.</p> <p><b>Design Training to Adapt Existing Skills:</b> Teach how behaviors within existing skills such as discovery, active listening, social selling, stakeholder management, commercial insight delivery, consensus facilitation and negotiation must adjust for virtual interactions.</p> <p><b>Design Training to Teach New Skills for Virtual Selling:</b> Teach new or emerging skills, such as Sense Making, digital dexterity and data literacy that reflect remote selling realities and changes in the buying environment.</p> <p><b>Teach Managers Virtual Selling Skills to Model for Sellers:</b> Help managers understand what mastery of virtual selling skills looks like so they can effectively coach on and model these skills for their teams.</p> <p><b>Set Standards for Effective Virtual Selling Coaching:</b> Set clear expectations for managers on what effective coaching behaviors for virtual selling look like.</p>	<p><b>Develop Hybrid Training Program:</b> In a hybrid set-up of in-office and remote work, prioritize live training sessions for “soft skills” training (e.g., negotiation training) or content requiring significant discussion; prioritize e-learning modules and other modes of asynchronous learning for “hard skills” training (e.g., using a new tool).</p> <p><b>Assess Seller Virtual Selling Skills:</b> Evaluate sellers’ mastery of skills such as digital dexterity and data literacy, identifying virtual selling skill gaps to close through training and coaching.</p>

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Activity	Short-Term Actions (One to Three Months)	Long-Term Actions (Six to 12 Months)
<p><b>Sales Communication</b></p>	<p><b>Establish Clear Communication Cadence:</b> Carefully plan and communicate the expected cadence of virtual events and training sessions, announcements and so forth, and match the messaging to the appropriate channel such as videos, emails, and intranet.</p> <p><b>Limit Communications to Sales Teams:</b> With an increased communication volume in a virtual environment and constantly evolving business conditions, establish sales enablement as the gatekeeper that funnels all messages to prioritize content that is consistent and tailored for sellers.</p>	<p><b>Ensure Change Readiness for a Hybrid Work Environment:</b> Work with sales leadership to deliver ongoing messaging and updates on how hybrid work aligns to corporate strategy and how to operate effectively in this type of environment, ensuring managers can contextualize ongoing changes and drive team engagement.</p>
<p><b>Sales Events (including Sales Kickoff)</b></p> <p>Source: Gartner</p>	<p><b>Host Frequent, Shorter Virtual Events:</b> Instead of annual events that bring the team together, host more frequent, shorter events to refine messaging and skills while boosting momentum from previous events.</p> <p><b>Create Online Learning Communities:</b> Reconstruct the in-person kickoff experience by creating online communities that allow sellers to engage in team-building activities, discuss relevant topics, post questions, share best practices and showcase customer examples.</p> <p><b>Tailor Content for Virtual Delivery:</b> Create content with concise and graphic-intensive slides; set aside time for frequent breaks throughout a virtual event, and provide supplemental information afterward to reinforce new ideas shared at the event.</p>	<p><b>Expand Seller Recognition Efforts:</b> Leverage sales kick offs and events to recognize seller accomplishments given that providing recognition to remote employees is challenging and a hybrid work environment is likely to be a significant change event.</p>

## Enabling Effective Virtual Selling

Sales enablement has a critical role to play in not only enabling sellers to prepare, plan and deliver engaging virtual sales interactions, but also adapting seller enablement for the virtual environment.

Table 4 highlights how sales enablement leaders can take short-term and long-term actions to optimize their approach to virtual seller enablement in areas such as sales enablement technology, onboarding, training, communication and events.

## Next Steps and Way Forward

For successful virtual selling today, sales enablement leaders must adjust their existing investments and reallocate resources among people, processes and technology. Furthermore, a more permanent shift to virtual selling is pushing sales organizations to adjust sales strategy, internal organizational design, go-to-market strategies and key performance metrics. Sales enablement leaders must stay aligned with these changes and prepare their teams to adopt new ways of enabling frontline sellers and buyers.



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