

Gartner®

Gartner for Sales Leaders

# Driving Seller Behavior Change



Sales enablement's continued focus on developing training and skills development knowledge transfer has made it difficult to position itself as a strategic partner to the CSO. Sales enablement leaders must focus on changing behaviors at scale to catalyze seller action and measure the impact of their initiatives.

## Overview

Chief sales officers (CSOs) often turn to enablement when seller skills gaps or execution challenges threaten commercial results. Enablement leaders often find themselves on the back foot, responding to requests and attempting to fix problems within the sales organization.

Yet many enablement leaders seek to be more than just order-takers or firefighters — they strive to be a true strategic partner to the CSO, helping to shape the initiatives that drive commercial success rather than simply enhancing execution.

Unfortunately, enablement's current strategies limit its ability to position itself as a strategic partner. Its limited focus on functional planning and goal-setting, overreliance on formal content development and training initiatives, along with its inability to link initiatives to commercial impact, severely undercut the function's ability to act strategically and proactively.

Enablement leaders need to collaborate with sales leadership to define a new enablement mandate that establishes seller behavior change as the core responsibility of the enablement function. With behavior change as their mandate, enablement leaders can better align enablement goals with sales strategy, prioritize initiatives and measure impact.

## Key Findings

- Eighty-three percent of CSOs and senior sales leaders report that their sellers struggle to adapt to customer needs and expectations, suggesting that enablement efforts to address seller skills gaps continue to lag behind commercial imperatives.
- Nearly 60% of sales enablement functions do not have a formalized charter or an annual planning process. This puts enablement in the position of reactive order-taker and prevents them from fulfilling their potential as a strategic partner to the CSO.
- Enablement has continued to focus on conveying information and developing skills while overlooking its higher level objective: changing seller behaviors.
- Enablement leaders must focus on changing behavior by providing sellers a trigger at the point of need to catalyze the right action.

CSOs rely on enablement to drive seller performance and productivity. While expectations are high, 82% of sales leaders believe that sales enablement content and/or delivery must significantly change to meet revenue goals in five years.<sup>1</sup> In addition, 83% of sales leaders report their sellers struggle to adapt to changing customer needs and expectations.<sup>2</sup> This suggests that enablement efforts continue to lag behind commercial realities.

This is perhaps not a surprise when you consider how most enablement functions operate.

We found three distinct gaps in enablement's current approach that limit its ability to emerge as a strategic component of the organization:

- **Limited focus on a strategic vision:** Despite CSOs' reliance on enablement; we found that only 43% of organizations craft a formalized charter,<sup>3</sup> which is a foundational guiding document that outlines the purpose, scope, strategies and responsibilities of the organization. Without a charter outlining their remit, the enablement team may be asked to take on a highly variable set of responsibilities, undermining its ability to focus and specialize. At the same time, only 37% of organizations have an annual planning process aligned with the sales strategy.<sup>3</sup> This essentially puts the enablement organization in a reactive position, taking orders rather than shaping strategy.
- **Overreliance on formal training and communication:** For many sales organizations, enablement continues to be analogous to training, with a particular emphasis on live or virtual classroom sessions, e-learning and peer-to-peer learning. Such training can help develop seller skills and competencies, but those skills and competencies are only valuable insofar as they support the behaviors necessary to achieve sales goals. Unfortunately, many sellers forget (or willfully disregard) what they've learned by the time they need to act, instead falling back on the behaviors that enablement seeks to change.
- **Measurement uncertainty:** This emphasis on training is also reflected in the metrics used for enablement. Many enablement organizations are held accountable to "vanity metrics" such as training attendance or satisfaction — they're easy to capture and understand, and it's often assumed that these metrics have some impact on higher-level sales KPIs (conversion rates, revenue, etc.). Yet most organizations do not measure impact in a way that can help them establish a plausible correlation between these metrics and higher-level sales KPIs, which means that these metrics reflect enablement activity rather than actual impact.

Sales leaders may also look to higher level commercial performance to assess enablement's impact — quarterly sales reports, quota attainment and pipeline conversion — yet these metrics too lack a direct correlation to enablement activity. For example, one might reasonably ask if conversion rates are up because of the negotiation training last quarter or because improving economic conditions mean that customers are simply more willing to spend. Moreover, as lagging indicators, they provide limited value for an enablement function looking to be proactive. In short, many sales enablement functions struggle to capture the direct impact of their initiatives, leaving them in the dark about what really works.

These three factors combined create a vicious cycle. Without a clear mandate, enablement teams are called in to “put out fires.” They use the familiar tools at their disposal to put out the fire — often training and communication — then turn to insufficient metrics to determine their success. Trapped in this cycle, sales enablement leaders will continue to struggle to be a strategic partner to the CSO.

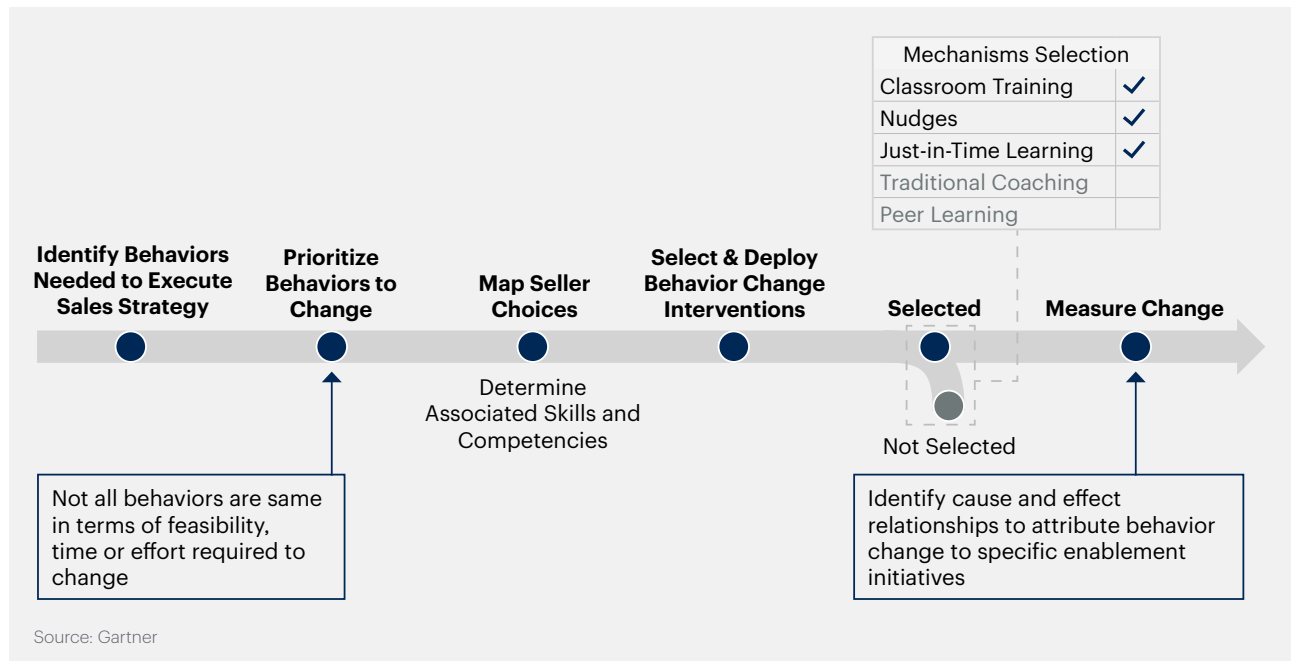
So how can they break the cycle?

## A New Focus for Enablement

Enablement leaders need to work with their CSOs to define a new enablement mandate that establishes seller behavior change as the core responsibility of the enablement function. Concrete seller behaviors identified by the sales leader as critical to sales objectives provide the link between sales strategy and enablement activity. While the current enablement approach focused on training and communication is effective at skills development and change awareness, it often fails to drive execution and action — and by extension, sales results. Skills are the abilities we have learned, but behaviors are what we do in the moment, and what ultimately impacts commercial performance.

To become a strategic actor in the sales organization, enablement’s remit must expand beyond just training and communication. Focus on identifying behaviors correlated with commercial success, scaling them across the sales force, and measuring the impact (see Figure 1).

**Figure 1: The New Enablement Mandate**

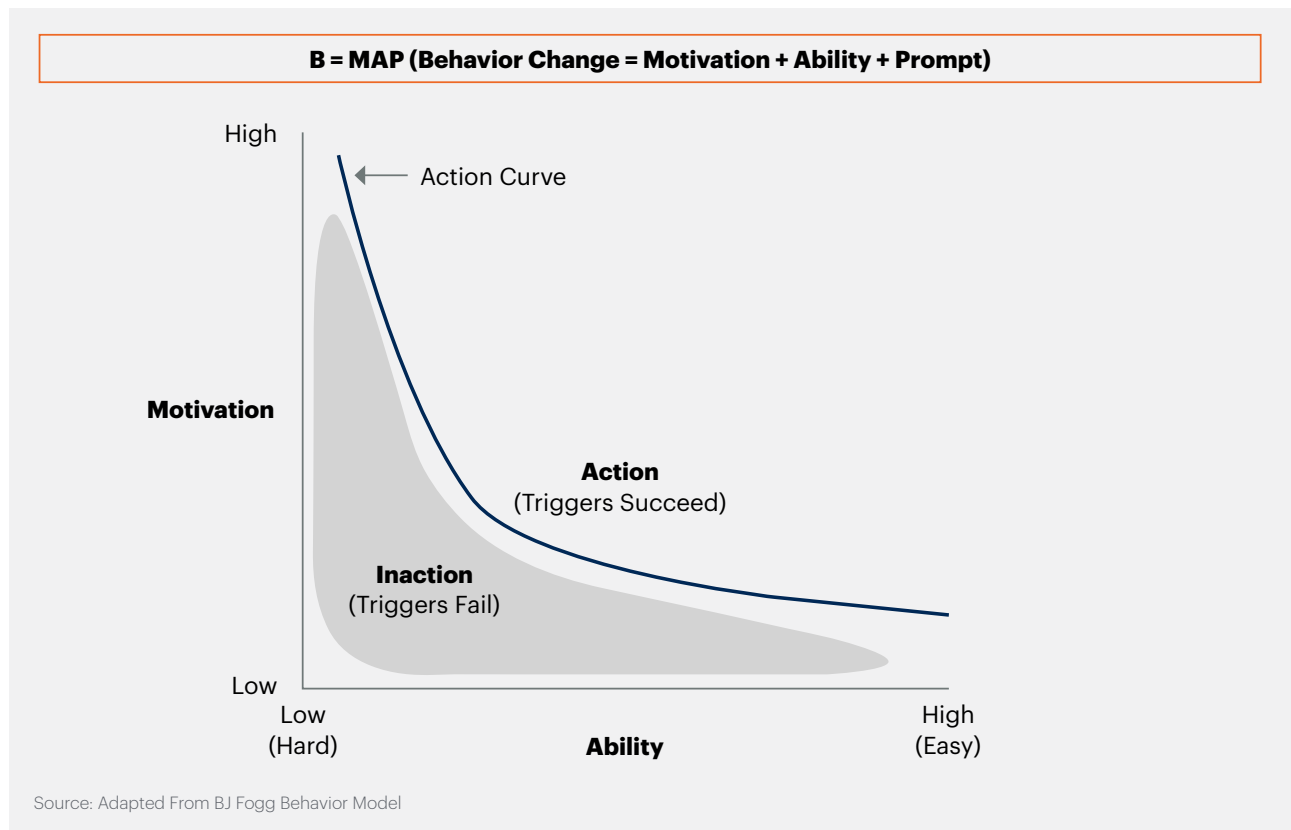


To adopt this new approach, sales enablement leaders need a framework that can give them a more holistic view of all the elements needed to initiate seller behavior change. This view of behavior change will empower enablement with the much-needed impact and evidence that can elevate the role into a strategic partner on the sales leadership team.

### The Model for Behavior Change

The social scientist BJ Fogg developed a fairly straightforward explanation for how behavior change happens (Source: BJ Fogg Behavior Model: Behavior Model). According to his model, action depends on the interplay of motivation, ability and prompt (see Figure 2).

**Figure 2: The BJ Fogg Behavior Model**



When a combination of motivation and ability places an individual above the action curve, a prompt will lead that person to perform the target behavior. To better understand this, consider the example below.

Two different sellers — let's call them Mike and Shreya — are both coached to ask more questions on discovery calls, rather than talk about the product. Initially, both Mike and Shreya lack the motivation and ability to do this. They both attend a one-day training on diagnostic questions and active listening. A few days later, Mike has a call with a lead he's been trying to reach for weeks. Just before he dials the client, he recalls that the training stressed the importance of asking questions and he goes into the call motivated to ask more questions. After asking a question to start and getting a short response from the client, Mike struggles to recall the other diagnostic questions from the training. Not wanting to waste the call, he falls back on what he knows — the product — and ends up going through features and benefits. In this case, Mike's motivation was high, but his ability was too low for him to act on the training.

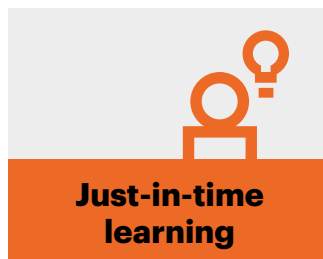
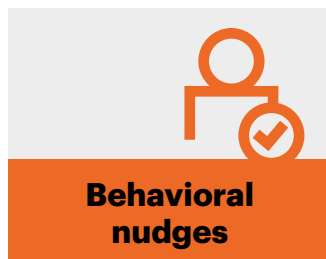
Shreya was in a similar situation, but 30 minutes before the call, CRM prompted her with a microlearning module summarizing the training, along with a tool or resource that provided a list of suggested diagnostic questions. This trigger enhanced Shreya's ability and motivation, while giving her a reminder to apply the skills on the call, leading her to action.

## Catalyzing a New Behavior in Sellers

As we saw in the example, a trigger catalyzes the right mix of motivation and ability into action. Traditional enablement approaches (manager coaching, peer learning, classroom training) are critical to increasing motivation and ability. The challenge is that they're often removed from when a seller would apply the behavior. The final piece of the behavioral puzzle is the trigger.

Of course, seller behaviors are multifaceted and what enablement leaders ask sellers to do can vary greatly day to day. Logging a deal in CRM is much different than recording personalized pitch videos, or even account planning and review. These different behaviors require different levels of motivation and ability, and likely different triggers.

The enablement leader must work with the CSO to identify critical behaviors necessary for their sales strategy and then determine how to influence sellers at the point of need to adopt the new behaviors. We've identified two key approaches for changing behavior. These approaches must supplement traditional enablement interventions such as classroom training, peer learning and manager coaching to ensure an appropriate mix of motivation, ability and trigger for behaviors critical to sales success:





## Behavioral nudges

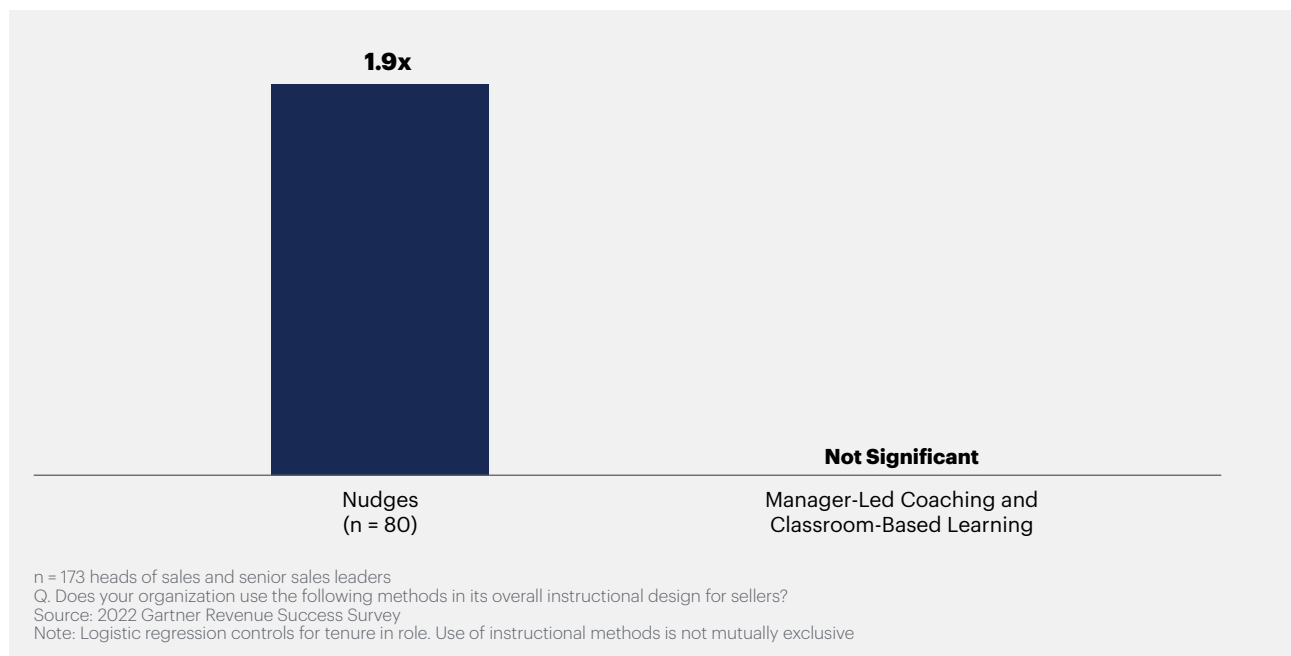
While there may be a subset of sellers who actively resist changing their behavior, it's more common for sellers to make decisions based on "satisficing." Satisficing is deciding on and pursuing a course of action that will satisfy the minimum requirements to achieve a particular goal. Often, this means choosing the first option or course of action that satisfies the minimum requirements. Behavioral nudges leverage this inclination to shape behavior.

Nudge theory is a social science concept, which holds that small noncoercive tweaks to how choices are presented to decision makers can shape their behavior in predictable ways by "nudging" them to a desired action. Nudges can be as simple as nutrition information about a burger included in the menu that subtly encourages us to make a healthier, more educated choice of food.

In our recent survey of sales leaders, organizations that used nudges in instructional design were two times more likely to exceed new customer acquisition targets than organizations that didn't use nudges.<sup>1</sup>

We see the same huge impact when looking at exceeding revenue targets. Organizations using nudges in their instructional design are 1.9 times more likely to exceed revenue growth targets than others not using nudges (see Figure 3).<sup>1</sup>

**Figure 3: Nudges Drive Revenue Growth**  
Likelihood of Exceeding Revenue Growth Target





## Behavioral nudges

### Types of Nudges

There are three key types of behavioral nudges.

- **Process-integrated nudges:** These are integrated into existing tools, systems and/or templates that establish the desired behavior as the default option. An example is a canned email template produced by your sales system to help encourage your sellers to send a follow-up email and to ensure they don't have to start from scratch with each new message.
- **Information presentation nudge:** This is presenting new or existing information differently to increase or decrease its perceived importance. If you want your sellers to sign up for a one-on-one coaching session, move the link in 12-point font from the bottom of the newsletter to the top line and put it in 24-point font.
- **Social comparison nudge:** This fosters social pressure to behave in a certain way often by establishing the behavior as socially desirable. For example, if sellers are just told to mention a new product in their calls as an upsell opportunity, this directive may not change their behavior. But if sellers are told that 80% of the team in another region mentioned this new product and saw success; this social comparison changes the dynamic.

While a single nudge might seem insignificant on its own, using nudges to shape a range of choices can, in aggregate and consistently over time, make a desired behavior much more likely. It is therefore essential to be mindful of the overall choice environment available to sellers. Understanding this environment provides the necessary context needed to string enablement efforts along with nudges to drive a particular behavior.

One organization, S&C Electric Company, successfully designed a choice environment that leveraged nudges to drive technology adoption (see Case in Point). This example shows how nudges can serve as the perfect trigger to push seller motivation and/or ability to take action.





## Behavioral nudges

### Architecting an Effective Choice Environment

S&C Electric Company recognized that CRM migration was too significant a goal to tackle all at once. It prioritized discrete behaviors the sales enablement team could directly influence while still supporting the long-term goal of migration. S&C thought if it could get sellers to do one thing in the new CRM platform (enter leads) and make it easy for them to get additional value once there (by using analytics), they would probably stick around. S&C Electric Company's behavior-centric approach had two core elements that allowed it to increase its timely entry of sales leads from 42% to over 80%.

- Choice Architecture Framework: S&C Electric Company targeted singular, discrete behavior changes, mapped the choices that lead up to those behaviors, then designed nudges to indirectly influence those choices, making the desired behavior more likely.
- Friction-Modifying Nudges: S&C used nudges to make it more difficult to execute undesired behaviors and/or make it easier to execute desired behaviors.
  - Process Integrated Nudges to Increase Friction: S&C created noncoercive barriers for undesired behaviors, which nudged sellers toward a faster adoption of desired behaviors.
  - Information Presentation Nudge to Decrease Friction: S&C altered the presentation of a key seller choice by centering the analytics option on the CRM landing page, increasing its salience to users and reducing the difficulty of navigating to it.

Read the full case study here:

[Case Study: Drive Technology Adoption With Nudges](#)



## Just-in-time learning

Just-in-time learning is another approach to increase seller ability at the moment of action. As the name implies, just-in-time learning is about providing the exact information a seller needs to execute an action precisely when they need it.

Consider a seller about to have a call with a new prospect. The seller hasn't had time to prepare. But as the seller gets the calendar reminder for the call, they also get a pop-up with the top three open-ended discovery questions to use with a new prospect and a one-page profile of the prospect including size, industry, previous interactions and business challenges.

As evidenced in Figure 4, just-in-time learning is also a driver for commercial success. Organizations that use just-in-time learning are 2.5 times more likely to exceed seller revenue target, 3.5 times more likely to exceed customer retention target and 2.3 times more likely to exceed retention target than organizations that don't use just-in-time learning.<sup>1</sup>

**Figure 4: Just-in-Time Learning Boosts the Bottom Line**



Across an entire sales force, enablement needs can be highly variable, making it difficult to deliver relevant learning content at the right time. Individual seller needs vary according to the role, workflow, individual skill, knowledge level and past experience. VMware, an information technology company, figured out how to overcome these challenges to deliver just-in-time learning at scale.



## Just-in-time learning

### Tailored Enablement and Just-in-time Learning at Scale

VMware implemented a solution that minimized manual effort while ensuring all revenue-facing roles received tailored enablement content and just-in-time learning at the point of need. VMware utilized a CRM-integrated learning platform (its proprietary Learning Hub) and individual skills heat maps to provide enablement support aligned to buying journey stages at the point of need. The three essential components of this implementation are:

- **Individual Skills Heat Maps:** VMware generates heat maps of individuals' knowledge and skills against their role profile, based on self-assessments validated by managers, to identify individual skills gaps and enablement needs. This is done to identify the exact targeted support needed for each seller and how just-in-time learning can address their knowledge gaps.
- **Enablement Content at the Point of Need:** VMware integrated a learning management system (LMS) and a learning experience platform (LXP) into its proprietary Learning Hub, allowing VMware to deliver content based on individuals' skills at the point of need in their workflow. This maximizes the content's impact.
- **Attribution of Enablement's Impact on Revenue:** VMware analyzes specific enablement resources and trainings in the context of revenue opportunities to determine the impact of enablement's efforts on revenue.

Read the full case study here: [VMware: Tailored Sales and Revenue Enablement at Scale](#)

## Isolating and Measuring Enablement Impact

While just-in-time learning and behavioral nudges are critical to changing behavior, enablement leaders must be able to quantify the impact of their behavior change efforts. It is essential to identify and attribute enablement efforts to specific behaviors, since this isolates the impact of enablement on behaviors that then tie to sales results. Quantifying true enablement impact allows enablement leaders to make a principled case, based on effectiveness, as to where their time is best spent and which initiatives are likely to work. This allows them to drive the conversation around how they can support the sales strategy, rather than being an order-taker.

In this respect, determining success metrics should be a key part of planning and scoping any enablement initiative. This starts with aligning the initiative to overall sales goals. Enablement leaders should then work with the CSO to identify the behaviors that are necessary to achieve the goal. For example, suppose the CSO wants to expand into the telecom market and take market share from a specific competitor. This would require sellers to articulate their product’s differentiation against the competitor — a specific behavior.

With alignment on a specific behavior(s) expected to drive sales strategy, enablement leaders can then design initiatives to drive that behavior, with a clear view on how it will support higher level sales KPIs. Enablement leaders should focus on measuring the prevalence of the behavior in the overall sales force (or a pilot group) as that speaks directly to the efficacy of enablement efforts. See Table 1 below:

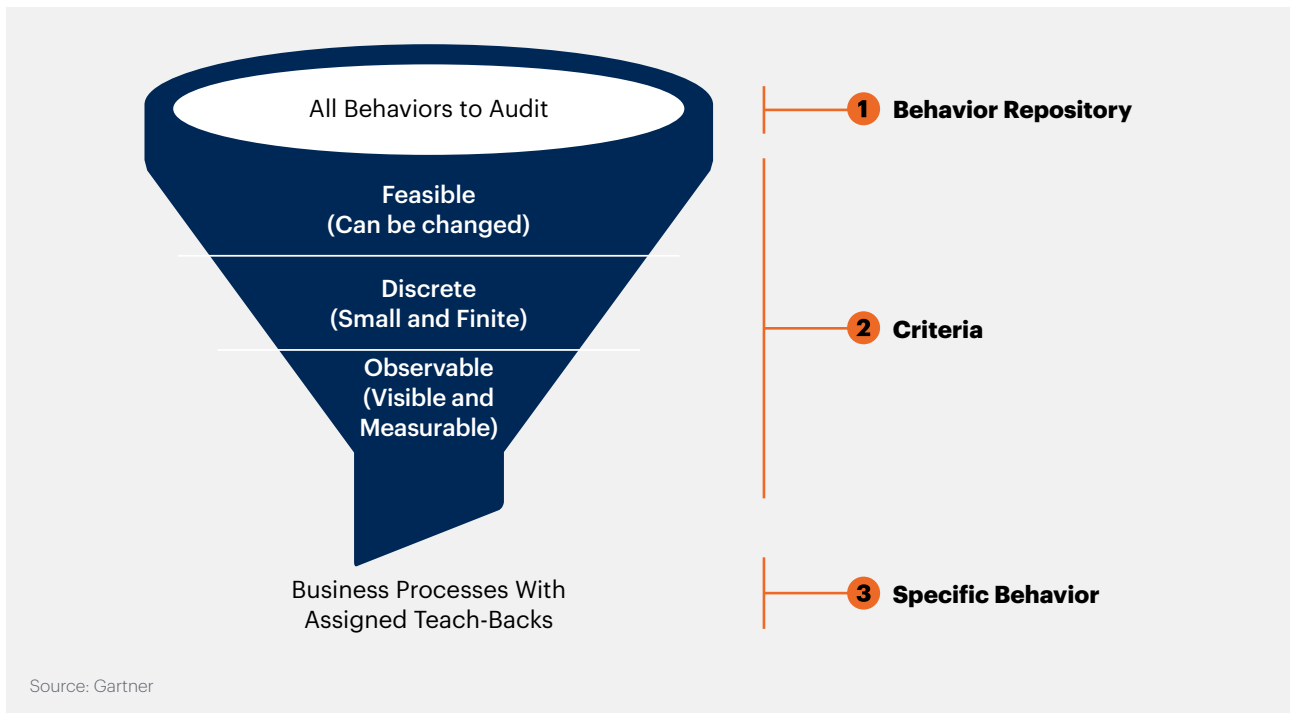
**Table 1: Examples of Tracking Sales Enablement Activities Tied to Behaviors**

Behavior	Behavior Goal	Enablement Activity	Enablement Consumption and Retention	Behavior Results
Competitive differentiation against a competitor	<ul style="list-style-type: none"> <li>50% increase in proposals with targeted configurations</li> <li>14 competitive swap-outs this quarter</li> </ul>	<ul style="list-style-type: none"> <li>Competitive playbook</li> <li>Just-in-time e-learning: “how to target competition”</li> <li>Configuration guidance — sized to win webinar</li> </ul>	<ul style="list-style-type: none"> <li>43% of sellers viewed playbook</li> <li>85% average assessment score</li> </ul>	<ul style="list-style-type: none"> <li>56% increase of special configurations in quotes</li> <li>16 competitive swap-outs</li> </ul>

Source: Gartner

However, not all behaviors are well-suited for enablement initiatives. For example, while “being confident on sales calls” is a behavior, it would be very hard to evaluate and measure as compared to something like “present three different options in negotiations.” When aligning with sales leadership on specific behaviors to target, enablement leaders should use the approach in Figure 5 below.

**Figure 5: Focus on a Specific Type of Behavior**  
Behavior Audit Process



For more detail on how to measure enablement impact, see [The Right Way to Measure the Impact of Sales Enablement](#). Read below to see how an organization successfully identified behaviors that needed to be changed and proactively measured enablement’s impact in changing the said behavior and its link to commercial outcomes.

## Behavior Change: Identify, Instill and Isolate Impact

Mimecast's enablement team felt their impact was discounted across the organization as they were unable to directly attribute enablement activities to sales results. By using a mixed-method two-stage behavior identification approach, the enablement team ensured effective, measurable behavior change. Mimecast observed that a small change in seller behavior (i.e., asking questions, talking less) drove significant impact in key metrics: lead conversion (+30%); pipeline cover/volume (+173%); average customer size in target segment (+25%); and average order value (+77.5%).

The three crucial components of Mimecast's mixed-method approach to behavior identification and measurement are:

- **Mixed-Method Two-Stage Behavior Identification:** Mimecast uses quantitative and qualitative analysis to first identify sales process steps and activities against which to focus enablement initiatives, and then again discover the desired behavior that achieves success in the identified area.
- **Behavior-to-Habit Transformation:** Mimecast turns seller behaviors into habits by first building seller confidence in the behavior and then by grading calls, with a focus on constructive improvement in application.
- **Proactive Measurement to Demonstrate Enablement's Impact:** Mimecast uses control groups and A/B testing to isolate the impact of the initiative on target behaviors.

Read the full case study here: [Case Study: Isolate and Measure Enablement's Impact](#)

## Measuring Behavior Change

As we saw in the Mimecast case in point, measuring behaviors that are tied to sales performance is key to demonstrating the impact of enablement initiatives. A/B testing is key to this. At the most basic level, sellers are split into two groups, at random. One group receives the targeted behavior change initiative, while the other group does not receive the behavior change initiative.

Isolating and testing one variable at a time makes it easier to understand the impact of enablement's behavior change efforts. Time permitting, organizations can even go one step further and look downstream at differences in commercial outcomes between the A and B groups — deal size, conversion rate, sales cycle time — to confirm that target behaviors are yielding tangible results.

## The New Enablement Mandate

A behavior change-focused model of enablement is centered around identifying the right mix of behavior change elements (motivation, ability and trigger) and measuring the behavior change. To do this, enablement leaders must add nudges and just-in-time learning to their toolkits, ensuring that sellers are equipped and encouraged to act.

# Conclusion

By moving beyond skills and competencies and focusing on behavior change, enablement can change its role from being a “fixer” to a strategic partner to the CSO. Focusing on behavior change helps enablement build a function that is part of a CSO’s strategy, is aligned to business objectives and tracks and measures enablement’s impact on those objectives.

## Recommendations

Sales enablement leaders should shift their focus to behavior change by focusing on the following key actions:

- **First 30 Days:** Align all current, ongoing and upcoming enablement initiatives with the sales strategy based on relevance to business growth. Identify behaviors needed to execute the sales strategy and validate these behaviors with the CSO.
- **Next 60 Days:** Prioritize behaviors to change based on feasibility, finitude, effort and measurability. Identify mechanisms to effectively measure the behavior change and implement the relevant mix of behavior change components (motivation, ability and trigger).
- **Following 90 Days:** Map the seller choice architecture in association with enactment of these behaviors and determine the associated seller skills and competencies.

## Evidence

<sup>1</sup> 2022 Gartner Revenue Success Survey: This online survey was conducted from November 2022 through December 2022 to understand key differences in the revenue tech stack, sales enablement approaches to behavioral change and collaboration skills of high performers and low performers. The survey was completed by an online sample of 194 C-suite respondents (chief sales officers, chief revenue officers, etc.), senior sales executives and other senior leaders across Asia/Pacific (9%), Western Europe (18%) and North America (73%). Qualifying respondents had roles focused on commercial operations/revenue operations, sales strategy, sales/revenue technology or specific geographic location with enterprisewide annual revenue in 2021 of more than \$5 million or equivalent or business unit/region annual revenue in 2021 of more than \$25 million or equivalent. Industry segments included banking/financial services, business services, information technology, manufacturing and healthcare providers.

<sup>2</sup> 2022 Gartner Chief Sales Officer Strategy Survey: This online survey was conducted from November 2022 through December 2022 to understand how sales teams align their go-to-market (GTM) approach to changing customer needs. The survey was completed by an online sample of 213 chief sales officers and senior sales executives across Asia/Pacific (13%), Western Europe (17%) and North America (70%). Qualifying respondents had to belong to either a sales, commercial operations or revenue operations function of an organization with enterprisewide annual revenue in 2021 of more than \$50 million or equivalent or business unit/region annual revenue in 2021 of more than \$250 million or equivalent. Industry segments included banking/financial services, manufacturing, services, information technology, healthcare providers and energy.

<sup>3</sup> 2022 Gartner Sales Enablement Benchmark Survey: This survey was conducted online from January through March 2022 to understand trends in enablement functions' structures, budgets, staffing, technology, performance measurement, training and onboarding metrics. The survey sampled 26 respondents in Croatia, India, Spain, Switzerland, the U.K. and the U.S. from a variety of industries: healthcare, information technology, manufacturing, professional services, telecommunications and transportation. To qualify, participants were required to hold a leadership role as the head of sales, sales enablement or sales operations, with decision-making authority in the sales enablement function. Respondents came from organizations with US\$31 million or more in annual revenue and primarily sell to B2B or B2B2C.

© 2023 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.



# Actionable, objective insight

Position your organization for success. Explore these additional complimentary resources and tools:



## Guide

### Does Your Sales Enablement Program Effectively Measure Impact?

Apply this framework to properly measure impact on seller behavior and sales goals.

[Download Now](#)



## Tool

### Gartner Sales Enablement Budget and Efficiency Benchmark

Find out how we can help you benchmark your sales enablement function.

[Learn More](#)



## Journal

### The Chief Sales Officer Quarterly

Explore this quarterly publication outlining actionable insights for forward-thinking sales leaders.

[Download Now](#)



## Podcast

### The Gartner Sales Podcast

Hear what Gartner experts have to say about the latest trends and technologies in sales.

[Listen Now](#)

Already a client?

Get access to even more resources in your client portal. [Log In](#)

# Connect With Us

Get actionable, objective insight that drives smarter decisions and stronger performance on your mission-critical priorities. Contact us to become a client:

**U.S.:** 1 855 811 7593

**International:** +44 (0) 3330 607 044

[Become a Client](#)

**Learn more about Gartner for Sales Leaders**

[gartner.com/en/sales](https://gartner.com/en/sales)

**Stay connected to the latest insights**

