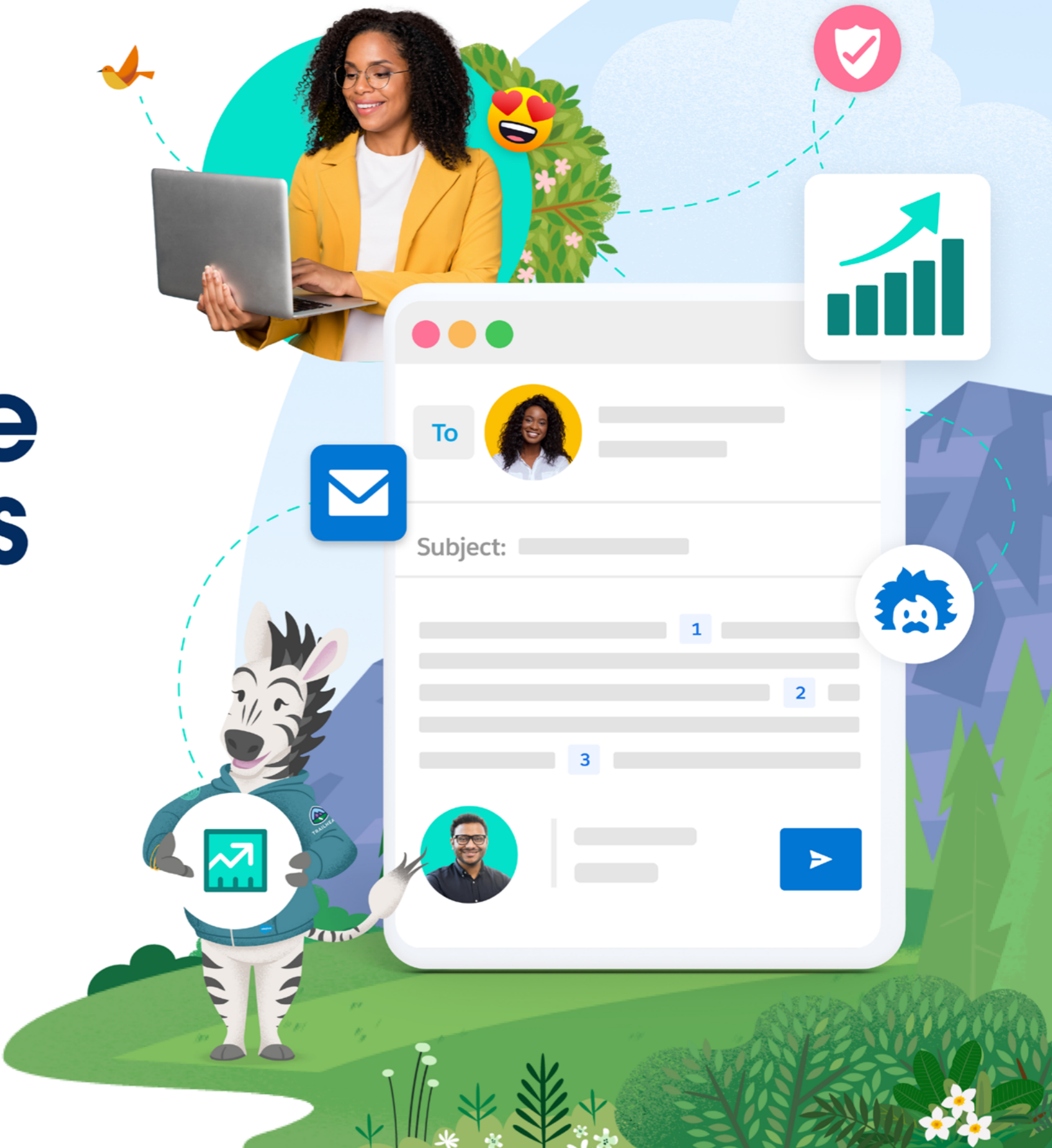




Trends in Generative AI for Sales

Insights from More Than 1,000 Sales Professionals on Using Generative AI at Work



Research Methodology

Salesforce conducted a survey on generative AI in partnership with YouGov from May 18–25, 2023. It included more than 4,135 full-time employees across sales, service, marketing, and commerce.

The data in this guide reflects responses from 1,036 full-time sales professionals, representing companies of a variety of sizes and sectors in the United States, United Kingdom, and Australia. The survey took place online. The figures have been weighted and are representative of all U.S., U.K., and Australian full-time employees over the age of 18.



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Foreword



Jennifer Lagaly

EVP, Sales, Salesforce

You've probably heard a lot about generative AI by now. You've probably even tried using it for basic tasks like writing emails, only to get back generic copy with questionable accuracy. Not very revolutionary.

Imagine using generative AI that pulls not just from public databases, but from customer data you can trust. This tool can see that a customer just browsed your website and launched a new product. Then it can create a sales strategy for your team that's so relevant and personal, it makes junior sellers as effective as top reps.

Now that's a game changer. At Salesforce, we've made this dream possible. We see generative AI as the technology of our lifetime. And we want to help you differentiate yourself and your company by supersizing your skills with generative AI.

Here's how. The first wave of generative AI will come over the next year or two. During this first part of the innovation cycle, the advantage will go to the early adopters. My advice? Get innovative, act with urgency, and use it.

Then, there will be a second wave of generative AI, as its use becomes widespread and sustainable. That's when the advantage will go to the companies with the cleanest customer data. My advice? Don't wait to shore up your data.

To get you started, this report sheds light on how more than 1,000 sellers are experimenting with generative AI. You'll learn how they're overcoming skills and trust hurdles. You'll get insights for catching the first wave of generative AI with new tools. And you'll learn the importance of cleaning and securing your customer data to use this technology effectively long-term.

01

Generative AI Is Helping Teams Sell More, Faster

Over half of sales professionals agree that generative AI helps or will help them do their jobs better in several ways:

- **58%** of salespeople agree generative AI helps or will help them increase productivity. They estimate it saves or could save them 4.5 hours a week.
- **56%** say it helps or will help them increase sales.
- **61%** say it helps or will help them better serve customers.

Sales professionals are already using generative AI to help with a variety of tasks, from researching accounts and writing prospecting emails to creating sales reports and building sales strategies.

Sales professionals already using generative AI are using it to:

Create basic content

82%

Analyze market data

74%

Automate sales communications

71%

Create sales reports

68%

Build sales plans and strategies

68%

Base: Respondents who use generative AI



Marcus Chan

Sales coach and author of "Six-Figure Sales Secrets"

"The future of sales is to serve, not sell. Generative AI gives us guidance that's so personal and precise, we're always presenting the most relevant solutions – no pushing required."

02 Sales Teams Feel Unprepared for Generative AI

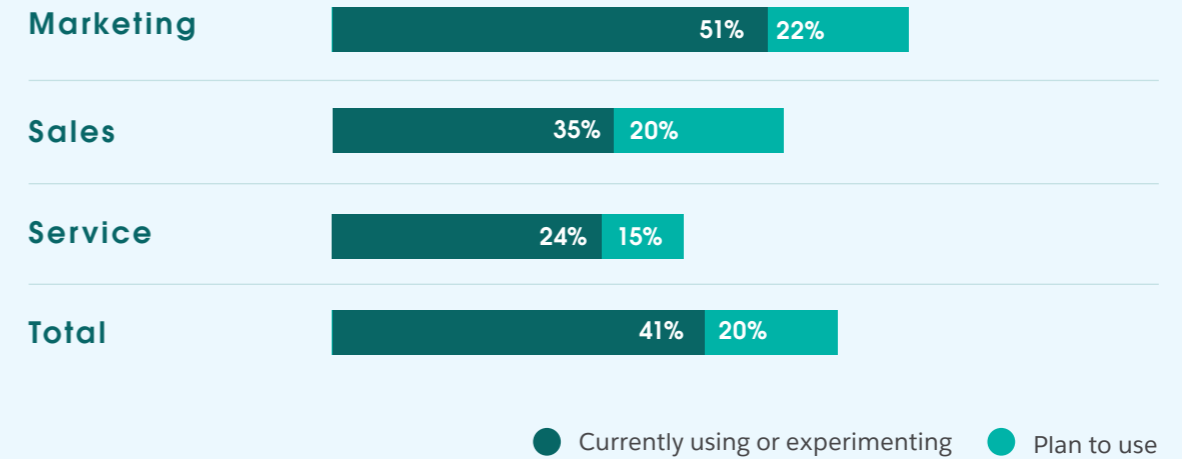
About a third of sales professionals are currently using or experimenting with generative AI. That's more than in service but less than in marketing.

What's holding sales teams back? Largely, a trust and skills gap.

Most sales professionals say generative AI introduces new security risks, and nearly half (49%) also think generative AI outputs are inaccurate.

Many also feel unprepared. Only 47% say they know how to get the most value out of generative AI at work.

Sales professionals report low generative AI adoption compared to marketing counterparts.



A trust gap:



of sales professionals say generative AI introduces new security risks.

A skills gap:



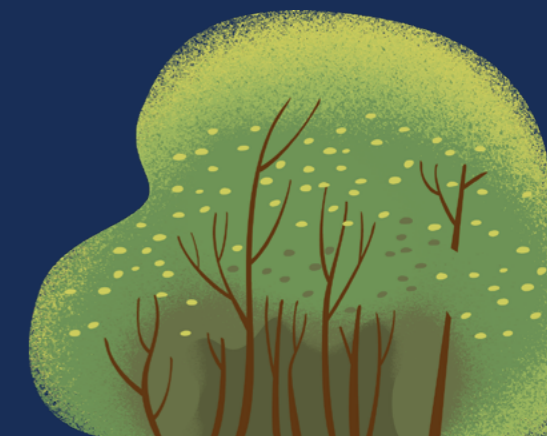
of sales professionals say they don't know how to safely use generative AI at work.



Anita Nielsen

Sales leader and author of "Beat The Bots: How Your Humanity Can Future-Proof Your Tech Sales Career"

"The reality is that being unprepared is a choice. The benefits come when we see AI as a tool, not a terror, and bring it into our sales motions."



03

Building Trust: Sellers Want Oversight and Secure Data

To close the trust gap, sales professionals prefer to keep a human in the loop and protect sensitive data.

The majority of sales professionals say ethical-use guidelines are critical for successfully using this technology. Most also call for human oversight to verify its conclusions, with more than two-thirds (68%) agreeing that generative AI lacks human contextual knowledge.

Sales professionals are also focused on data security, with 63% saying that their company's data is not properly set up for generative AI.

A call for human oversight:

56%

of sales professionals say human oversight is important for using generative AI.

A call for ethical guidelines:

54%

of sales professionals say ethical use guidelines are critical for using generative AI.

Sales professionals say these are the more important factors for using generative AI:



Human oversight



Trusted customer data



Enhanced security measures



Ethical use guidelines



Combined public and private data (e.g., customer data)



Scott Leese

Sales leader and Founder, Scott Leese Consulting

“Before we can experience the benefits of generative AI, we have to know we can trust it. Work with your technical teams to safeguard customer data and monitor results for inaccuracy and bias.”



04

Building Skills: Sellers Want Training and Opportunities

As generative AI arrives at work, sales professionals are torn between feeling excited and unprepared.

On one hand, sales professionals are concerned about job security, with 39% worrying they will lose their jobs if they don't learn how to use generative AI at work.

On the other hand, they see the potential of generative AI to bring positive change to their role: 56% of sales professionals say that generative AI will transform the skills they need at work.

Eager to learn, sales professionals are looking to their companies for opportunities to work with generative AI.



John Barrows,
CEO, JBarrows Sales Training

“Turn your sales org into a sales lab. Give generative AI tools to your sellers and tell them to experiment until they find the applications they love. That’s how we’ll train sellers – not from the top down, but from the bottom up.”

AI Resources for Sales Teams:



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Watch the demo



Hear from a Salesforce sales leader on winning with AI.

Watch the webinar





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