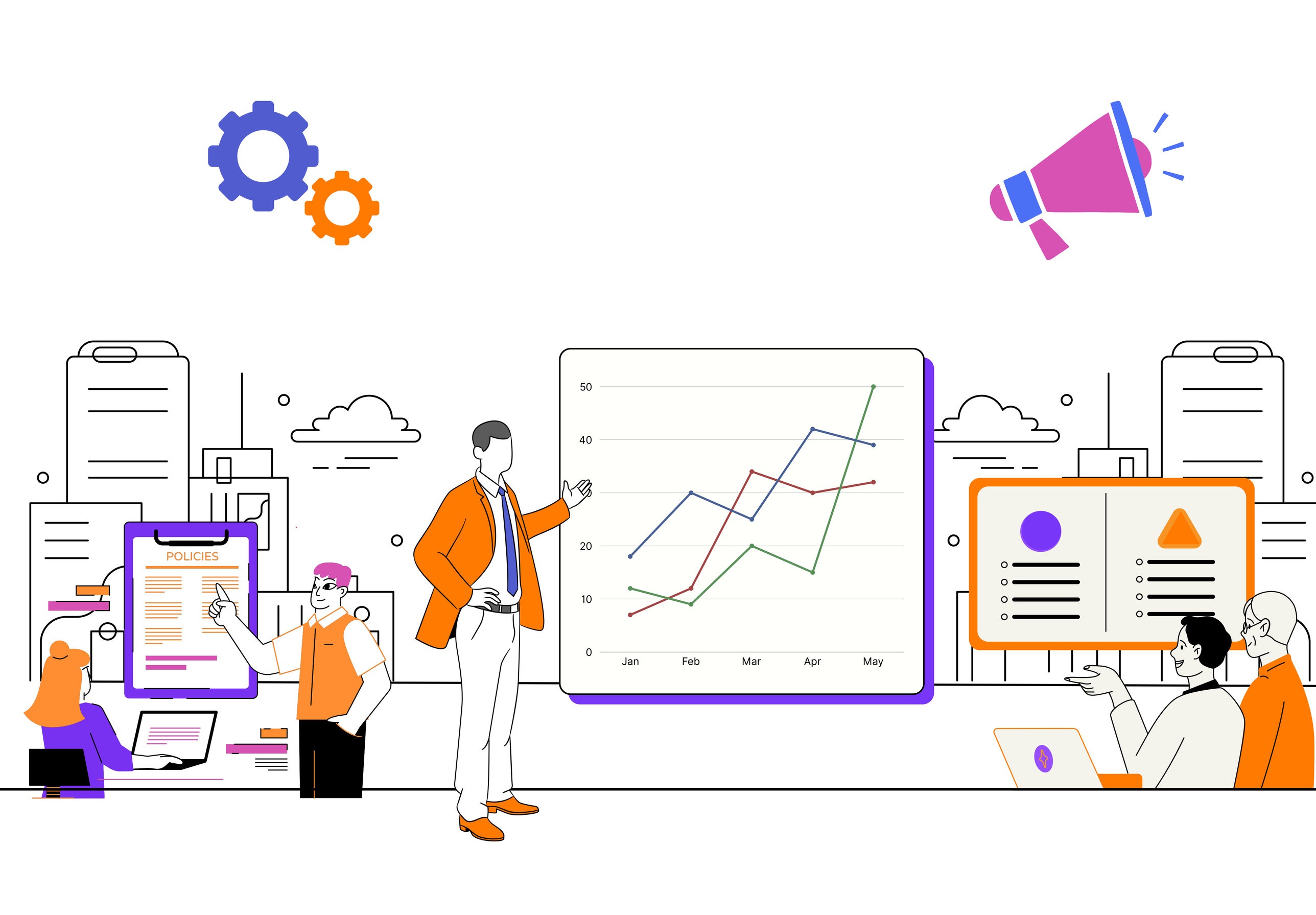
ConvergeHub

# CONVERGEHUB CUSTOMER TRENDS REPORT 2027

Your Guide to Navigating Customer Engagement and Market Dynamics



# TABLE OF CONTENT


INTRODUCTION ____ 3

CHAPTER 1 ____ 6
**Relationship building: From Reps to Trusted Consultant**

CHAPTER 2 ____ 8
**Customer Journey: From Initial Touchpoint to Final Purchase**

CHAPTER 3 ____ 10
**Navigating Challenges and Opportunities in the Current Economic Landscape**

CHAPTER 4 ____ 11
**From Prospects to Partners: Mastering the Craft of Lead Qualification and Nurturing**

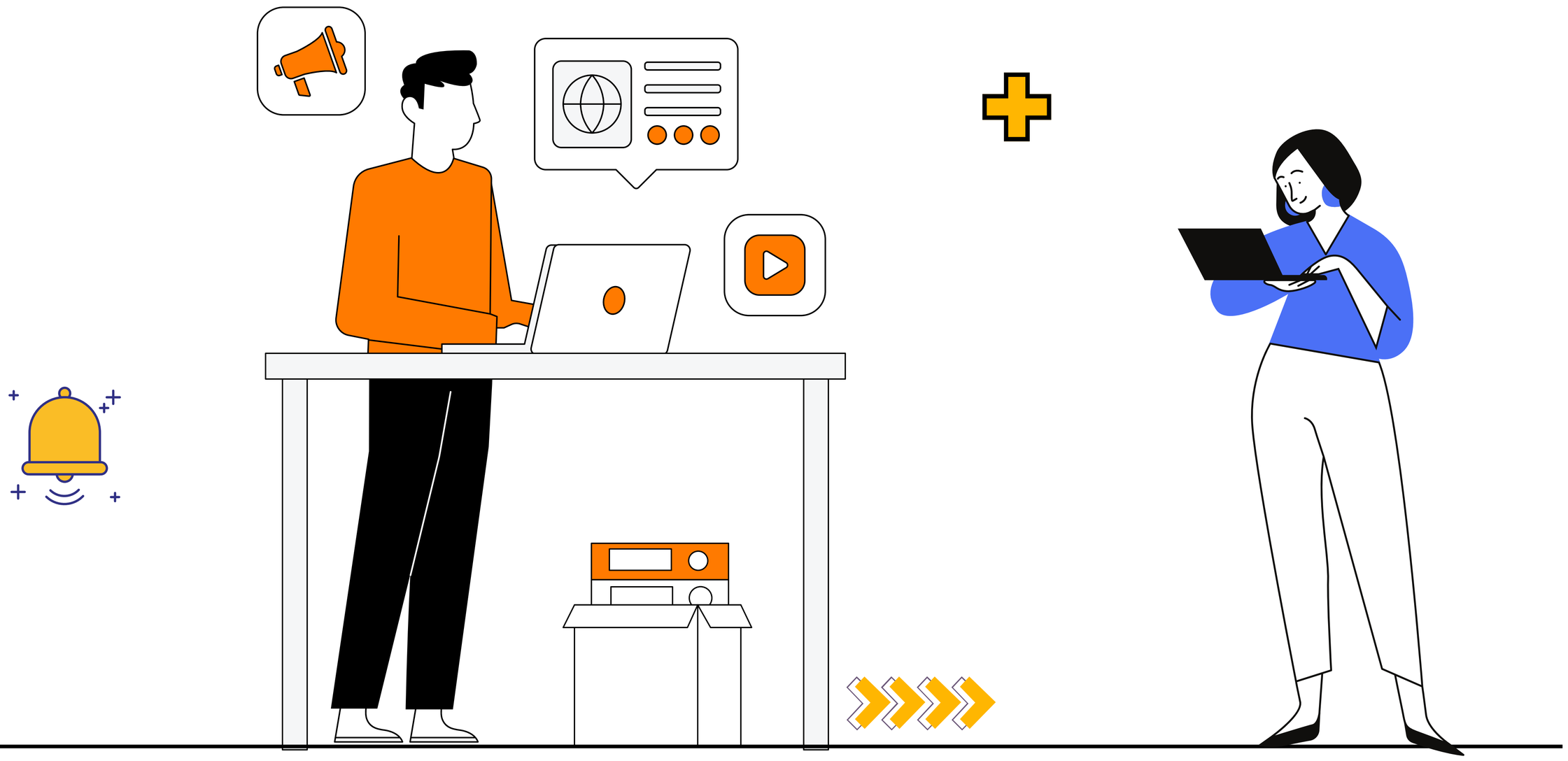
CHAPTER 5 ____ 13
**Sales Follow-up & Closing: Keys To Success**

CHAPTER 6 ____ 15
**Sales Performance Benchmark: Measuring Success Across Key Metrics**

CHAPTER 7 ____ 17
**Sales Tool Integration to Trim Your Tech Stack**

CHAPTER 8 ____ 18
**The Role of Customer Service in Relationship Management**

CHAPTER 9 ____ 20
**Navigating the Challenges of Cross-Functional Team Alignment**

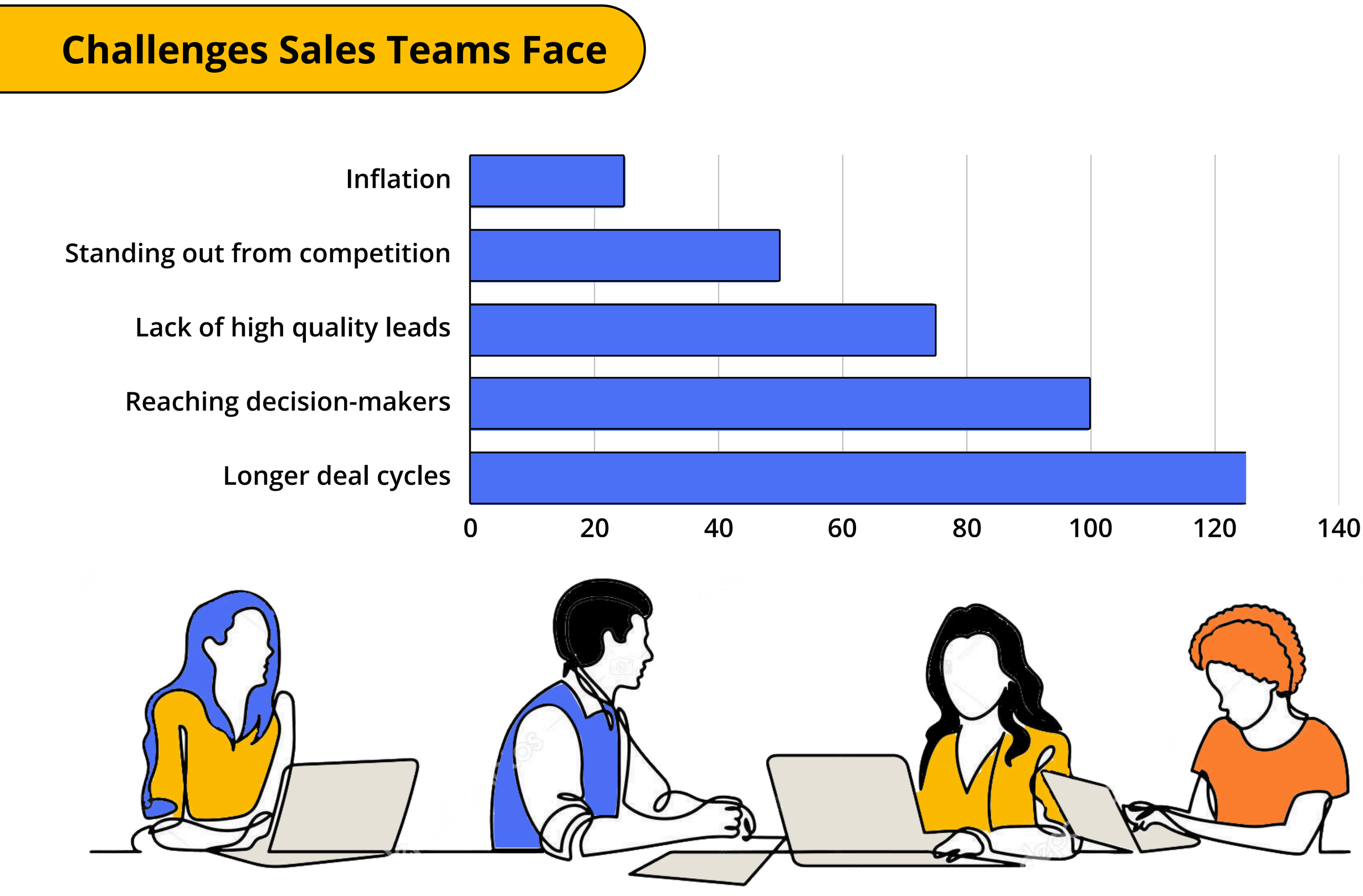



# INTRODUCTION

Shaped by the persisting effects of recent economic challenges and the emergence of new opportunities, the latest customer trends show some significant patterns and shifts in customer behavior. With AI and other new technologies taking center stage and the world going on a toss in terms of how businesses are managed, sales teams are facing a new set of challenges to cope up with the new atmos.



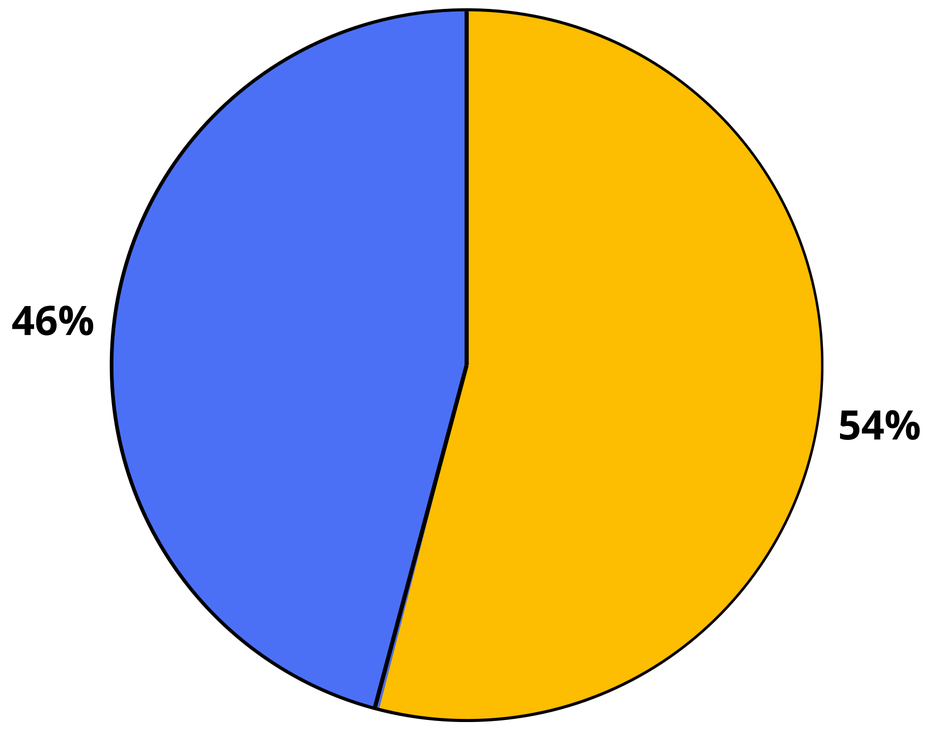
Currently, you need a lot of things to ensure customer acquisition. Starting from buyer's growing demands, to keeping up with the latest technological advancement, the challenges may be various. This report aims to provide a comprehensive overview of the latest customer trends, challenges, and strategies that are defining our industry.



# Key Observations:

## Persistent Challenges

54% of sales professionals report increased difficulty in selling, citing inflation, competition, and longer deal cycles as major factors. Other significant factors include buyers' cravings for personalization, finding the right balance with AI, misalignment of marketing and sales, etc.




## Signs of Improvement

With inflation slowing, we anticipate gradual easing of budget constraints.

## Emerging Strategies

There is a high emphasis on relationship-building, customer referrals, and AI adoption for improved efficiency, saving up to 2 hours daily.

# Key Focus Areas:

Here we will explore these trends in-depth, offering insights on adapting to economic conditions, optimizing team structures, leveraging technology, and strengthening customer relationships. Our goal is to equip sales teams with the knowledge to turn current challenges into opportunities for growth and innovation.



## Performance Benchmarks:

Essential statistics to inform your sales strategy for the upcoming year.

## AI Impact:

Data-driven analysis of how AI is transforming the sales process for both buyers and sellers.

## Relationship Management:

Strategies for maintaining and strengthening sales relationships in the current climate.

## Self-Service Evolution:

Insights into the growing importance of providing self-service options to customers.

## Budget Constraints:

Discussion on navigating and succeeding in an environment of tighter budgets.

## Team Enablement:

Insights on equipping sales teams with the right tools and fostering a supportive culture.

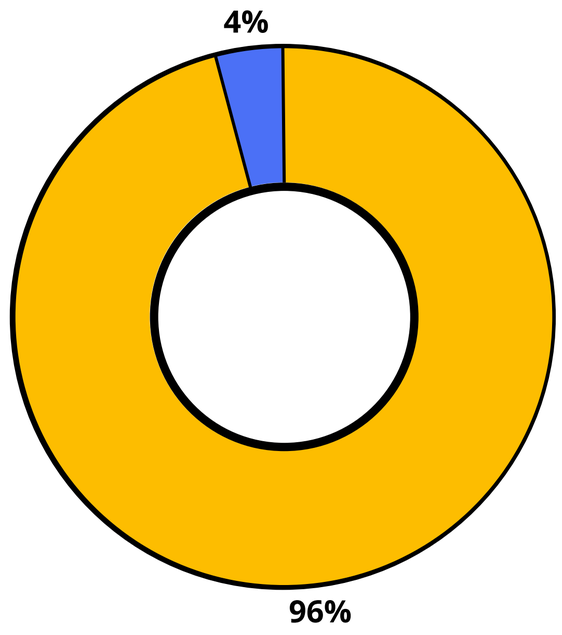
# Key Findings:

- 54% of sales reps report increased difficulty in sales
- 96% of consumers research products before ever speaking to a company rep
- 91% of companies with more than 11 employees now use CRM software
- AI-powered CRM systems can increase sales by up to 30%
- Sales reps spend only 28% of their week selling; the rest is consumed by admin tasks
- AI tools can save sales reps up to 5 hours per week on data entry
- 80% of customers are more likely to purchase from a brand that provides personalized experiences
- Companies using advanced personalization report a $20 return for every $1 spent
- 61% of companies leveraging automation exceeded revenue targets in 2023
- Automated email campaigns see 119% higher click rates than broadcast emails
- 75% of customers still prefer to interact with a real person even as self-service and automated channels improve
- Companies that balance human and digital contact channels retain 89% of their customers, compared to 33% for companies with weak omnichannel strategies
- Sales teams using engagement and intelligence tools see 12-15% more productivity
- 79% of sales teams using AI for forecasting have improved their close rates year-over-year
- Sales cycle durations has expanded by over 50%
- At least 6 months to close a deal for large investments
- 86% of salespeople faces at least 1 lost or delayed deal in a year
- 84% of B2B buyers initiate the purchasing process through a referral
- 81% of sales reps think that buyers are more into independent research nowadays
- B2B buyers finish 57% to 70% of their research before contacting sales
- 46% of B2B sales representatives consider lead quantity and quality as the top challenge.
- Just 25% of marketing-generated leads are ready to move directly to sales
- 61% of B2B marketers send all leads to Sales, yet only 27% are qualified
- 67% of lost sales occur because reps fail to properly qualify potential customers
- 79% of marketing leads fail to convert into sales because they lack proper nurturing
- 65% of B2B marketers have yet to implement lead nurturing strategies
- 74% of companies consider converting leads into customers their highest priority
- Companies skilled in lead nurturing generate 50% more sales-ready leads
- Only 52% of sales calls result in a closing attempt
- The average sales closing rate stands at just 29%
- 58% of businesses cite discontinuation of funding as the primary cause of lost sales deals
- Sales cycle duration have increased by more than 50%
- Win rates have declined for 42% of companies

- 81% of companies believe that enhanced processes, skills, or training would boost productivity
- While 63% of organizations use ten or more tools for sales activities, sellers often integrate fewer into their daily workflows
- 76% of organizations expect AI to significantly impact their daily operations in the coming year
- Key AI applications for enhancing sales productivity are analyzing call recordings (58%), aiding reps with customer questions (54%), and offering training recommendations (51%)
- By 2028, it's expected that 60% of B2B sales tasks will be handled through conversational user interfaces powered by generative AI
- 68% of consumers are willing to pay more for brands with excellent customer service
- 89% of consumers are more likely to repurchase after a positive customer service experience
- Good customer service converts 86% of one-time clients into loyal brand advocates
- 93% of customers are likely to return to companies that provide excellent customer service
- 80% of companies rely on customer satisfaction scores to assess and enhance customer experience
- 72% of companies believe analytics reports can enhance customer experience

# RELATIONSHIP BUILDING: FROM REPS TO TRUSTED CONSULTANTS

In the past, sales reps could close deals by simply walking prospects through the features and benefits of their product. But today, the sales rep's role has evolved. With 96% of consumers researching products before ever speaking to a company rep, they often already know why your tool is worth considering.




In a world where AI makes it easy to compare tools, features, and pricing, sales reps now need to act more like consultants and partners than traditional vendors. Prospects who reach out are beyond the basic research phase—they want to know how your tool can specifically benefit them. They expect tailored use cases for their industry and expert guidance on the ROI they can expect.

This shift means that sales conversations must be deeper, more personalized, and focused on building genuine, expert-level connections. Reps are also realizing the importance of nurturing relationships throughout the entire customer journey—from pre-sale to post-sale—to drive long-term revenue.

# Focus on Greater Sales Efficiency Through Strong Relationship



Building strong customer relationships while maintaining high efficiency is crucial for success. Sales professionals are increasingly leveraging technology and data-driven insights to streamline their relationship-building processes without sacrificing the personal touch.

Here are some points that highlight how modern sales teams are leveraging technology to build stronger customer relationships more efficiently, while still maintaining the crucial human element in sales interactions.

## Technology-Driven Relationship Management

- 91% of companies with more than 11 employees now use CRM software
- AI-powered CRM systems can increase sales by up to 30%

## Focus on High-Value Activities

- Sales reps spend only 28% of their week selling; the rest is consumed by admin tasks
- AI tools can save sales reps up to 5 hours per week on data entry

## Personalization at Scale

- 80% of customers are more likely to purchase from a brand that provides personalized experiences
- Companies using advanced personalization report a $20 return for every $1 spent

## Automation in Sales Processes

- 61% of companies leveraging automation exceeded revenue targets in 2023
- Automated email campaigns see 119% higher click rates than broadcast emails

## Balancing Automation and Personal Touch

- 75% of customers still prefer to interact with a real person even as self-service and automated channels improve
- Companies that balance human and digital contact channels retain 89% of their customers, compared to 33% for companies with weak omnichannel strategies

## Efficiency-Driven Relationship Building

- Sales teams using engagement and intelligence tools see 12-15% more productivity
- 79% of sales teams using AI for forecasting have improved their close rates year-over-year



# CUSTOMER JOURNEY: FROM INITIAL TOUCHPOINT TO FINAL PURCHASE

The consumer journey has undergone a dramatic transformation in recent decade, primarily driven by the rise of eCommerce and digital technologies. Today's consumers wield unprecedented power, with access to countless brands and products at their fingertips. Let’s learn the multiple aspects of the customer journey and how it has been impacted over the years.

## From Linear to Multi-Faceted

Traditionally, the consumer journey was linear: need identification, exposure to advertising (TV, radio, print), and in-store purchases. Now, it's a complex web of micro-journeys, each potentially leading to a purchase decision.

## New Channels and Touchpoints

The digital revolution has expanded product discovery through channels like online marketplaces, social media, and search engines. This creates more competition as consumers explore multiple pathways to purchase.

## The Digital Path to Purchase

Today’s customer journey is dynamic, with consumers exploring brands during research. Multiple digital touchpoints now shape their final purchasing decision.

## Two-Way Communication

The modern consumer journey features bi-directional communication, enabling consumers to engage actively with brands. They can access product information, share reviews, and interact with user-generated content, reshaping the consumer-brand relationship.

# Ways the Customer Journey is Changing

1

## Longer Sales Cycles

Sales cycles are getting longer, which is a permanent shift in the customer journey.

2

## Increased Reliance on Digital

Customers are interacting with brands across multiple channels and devices.

3

## Personalized Experiences

Customers want personalized touchpoints and expect companies to adapt to their changing needs and preferences.

4

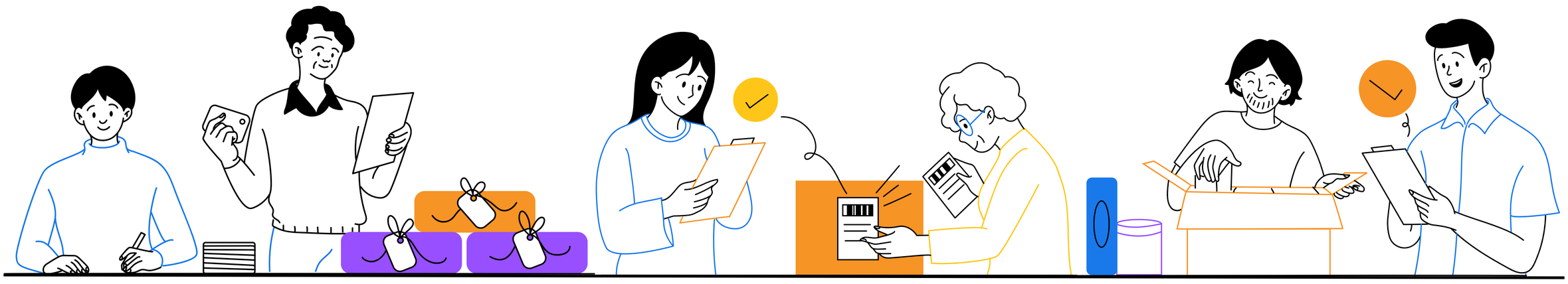
## Omnichannel Journeys

Customers are engaged post-purchase through channels like email, mobile push, and SMS.

5

## Complex Journeys

Omnichannel customer journeys can become extremely dynamic and complex, with a variety of entry and exit points.



# NAVIGATING CHALLENGES AND OPPORTUNITIES IN THE CURRENT ECONOMIC LANDSCAPE

In today's dynamic financial world, understanding the economic landscape is crucial. The global economy, influenced by factors ranging from geopolitical tensions to technological advancements, demands resilience and adaptability from individuals and businesses alike.

## Sales cycle durations have expanded by over 50%

Recent data reveals that the time it takes to complete a sales cycle has increased by more than 50%, indicating that deals are taking longer to close. This trend may be due to more complex buyer journeys or intensified market competition.

## At least 6 months to close a deal for large investments

Most companies require at least six months to close deals over $250,000. Transactions exceeding $250,000 typically take at least six months to close. This reflects the careful evaluation businesses apply to large investments and the extended negotiations often necessary in high-value sales.

## 86% of salespeople faces at least 1 lost or delayed deal in a year

86% of salespeople report losing or delaying at least one deal in the past year due to a key client stakeholder leaving the company. Building relationships with multiple stakeholders is vital to prevent deal disruption.

## 81% of reps say buyers prefer self-research

81% of sales reps report that buyers are doing more independent research before initiating contact. This shift means sales reps need to provide deeper insights and personalized solutions when buyers reach out.

## 84% of B2B buyers initiate the purchasing process through a referral

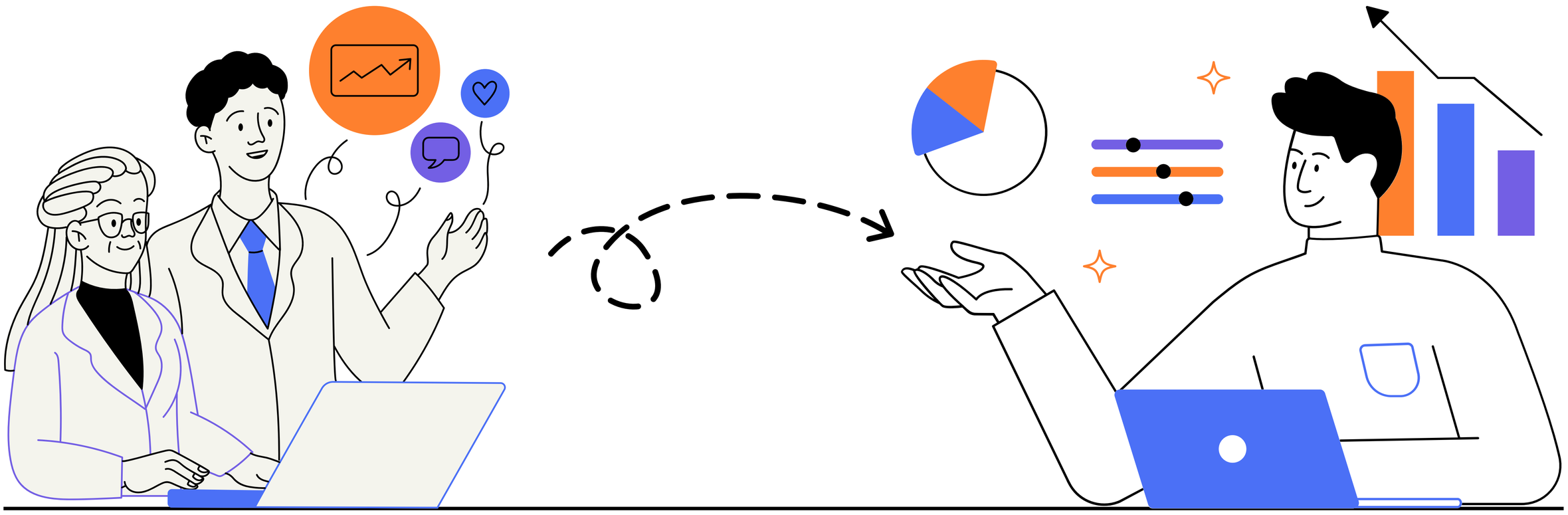
84% of B2B buyers initiate the purchasing process through a referral. This emphasizes the critical role of referrals in B2B sales. Building strong relationships and leveraging customer networks can significantly boost your chances of landing new clients.

## B2B buyers finish 57% to 70% of their research before contacting sales

B2B buyers complete 57% to 70% of their purchasing research before reaching out to sales. This highlights the importance of delivering valuable content and insights throughout the buyer's journey. Sales teams must be prepared to engage prospects with targeted information that aligns with their needs and concerns at this advanced stage.

# FROM PROSPECTS TO PARTNERS: MASTERING THE CRAFT OF LEAD QUALIFICATION AND NURTURING

Success isn't just about generating leads—it's about cultivating the right relationships. This section delves into the critical data for lead qualification and nurturing, exploring the stats that displays the challenges associated with the process of lead qualifying and nurturing.



## Lead Qualification

**46% of B2B reps cite lead quality as top challenge**

Nearly half (46%) of B2B sales reps cite lead quantity and quality as their biggest challenge. This underscores the importance of refining lead generation and qualification processes to drive better sales outcomes.

**Only 25% of marketing leads are sales-ready**

With only 25% of marketing-generated leads being sales-ready, there's a clear gap in lead quality. Improving lead qualification and nurturing processes can help boost conversion rates and drive more successful sales outcomes.

**61% of marketers send leads, only 27% qualify**

61% of B2B marketers pass all leads directly to Sales, but only 27% of those leads are qualified. Despite 61% of B2B marketers forwarding all leads to Sales, a mere 27% are actually qualified. This highlights the need for better lead qualification processes to enhance sales effectiveness and efficiency.

**67% of lost sales result from poor qualification**

67% of lost sales occur because sales reps fail to adequately qualify potential customers before guiding them through the entire sales process. This statistic underscores the importance of thorough qualification in the sales process.

## Lead Nurturing

1

### 79% of leads fail due to poor nurturing

Without effective lead nurturing, a significant 79% of marketing leads do not make it to the sales conversion stage. This highlights the crucial role nurturing plays in transforming potential customers into actual sales.

2

### 65% of B2B marketers lack lead nurturing

The lack of lead nurturing among 65% of B2B marketers highlights a significant gap in their strategies. This oversight can lead to missed opportunities for engagement and conversion, ultimately impacting overall sales performance.

3

### 74% of companies prioritize lead conversion

Around 74% of businesses recognize that turning leads into customers is crucial for sustained growth. This focus on conversion highlights the importance of effective sales and marketing strategies in driving business success.

4

### Skilled lead nurturing boosts sales-ready leads by 50%.

Companies that excel in lead nurturing produce 50% more sales-ready leads at a 33% lower cost. Effective lead nurturing significantly boosts efficiency, allowing companies to generate more sales-ready leads without inflating costs.

# SALES FOLLOW-UP & CLOSING: KEYS TO SUCCESS

Effective follow-up and closing are essential for driving sales success. As sales cycles become more complex and win rates decline, improving follow-up strategies and closing efforts can significantly enhance conversion rates and overall business outcomes.

## Sales Follow Up

1

### On average, 5 follow-ups are needed to close a sale

Research indicates that it generally takes five attempts to finalize a deal . This statistic suggests that initial outreach alone may not be enough; effective follow-up often plays a crucial role in converting prospects into customers.

2

### Only 66% of salespeople follow up more than once

Despite the advantages of multiple follow-ups, 44% of sales professionals cease their efforts after just one attempt. This highlights a missed opportunity for improving sales effectiveness, as increased follow-up could significantly boost success rates.

3

### The best time to follow up on a cold email is within 2 to 5 days

The ideal time to follow up on a cold email is between two to five days. Following up within this period enhances the chances of engaging recipients while the initial contact is still fresh, leading to a higher likelihood of a positive response.



# Sales Closing

01

## Only 52% of sales calls result in a closing attempt

Only 52% of sales calls result in a closing attempt. Surprisingly, just over half of all sales calls include an effort to close the deal, indicating a key opportunity for sales strategies to improve the conversion of interactions into successful sales.

02

## The average sales closing rate stands at just 29%

The average sales closing rate stands at just 29%. This highlights the difficulty in converting prospects into customers, underscoring the competitive and unpredictable nature of sales. Increasing follow-ups and closing attempts could potentially boost this success rate.

03

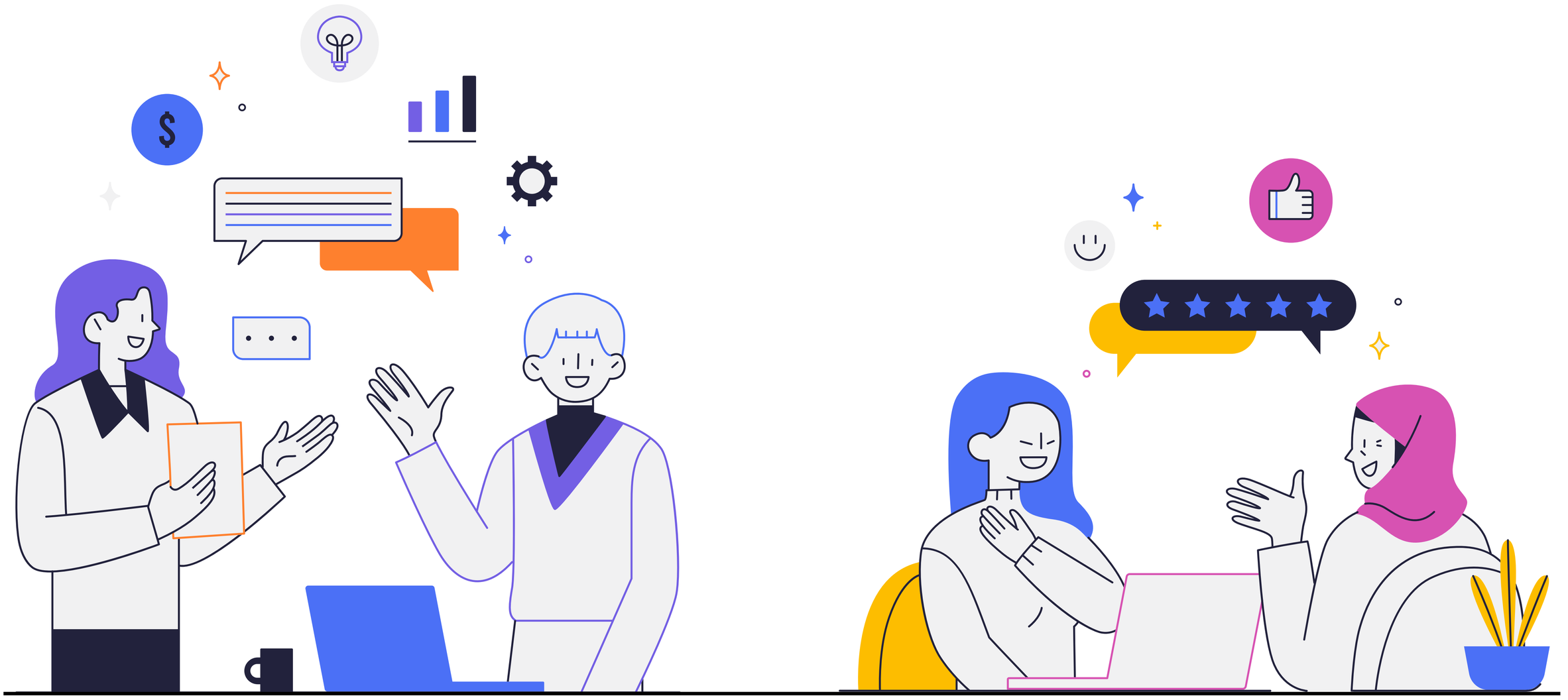
## Win rates have declined for 42% of businesses

Win rates have declined for 42% of companies. Alarmingly, one-third of these companies have seen drops of over 11%, highlighting a potential need to improve sales strategies or strengthen customer engagement and follow-up efforts.

04

## 58% of businesses blame lost sales on funding cuts

The most common reason companies lose sales deals is due to project funding being withdrawn, with 58% citing this as the primary cause. Additionally, 44% of buyers stall after initial discussions, and 41% of deals are lost due to a lack of ongoing communication, highlighting key challenges in maintaining buyer interest and securing commitments.



# SALES PERFORMANCE BENCHMARK: MEASURING SUCCESS ACROSS KEY METRICS

Sales performance benchmarks help businesses measure success by comparing key metrics like conversion rates, win rates, and sales cycle length against industry standards.

## Sales cycle duration have increased by more than 50%

The extended sales cycle, now over 50% longer, highlights the increasing complexity of buyer decision-making. This trend suggests that companies may need to invest more time and effort into nurturing prospects and closing deals.

## Win rates have declined for 42% of companies

42% of companies report declining win rates, with a third seeing drops over 11%, highlighting the need for improved sales tactics and stronger customer engagement.

## 84% of B2B buyers start with referrals

84% of B2B decision-makers start their purchasing journey with a referral. This underscores the significance of referrals in the B2B buying process. Establishing strong relationships and a solid reputation can greatly enhance your chances of being recommended to potential clients.

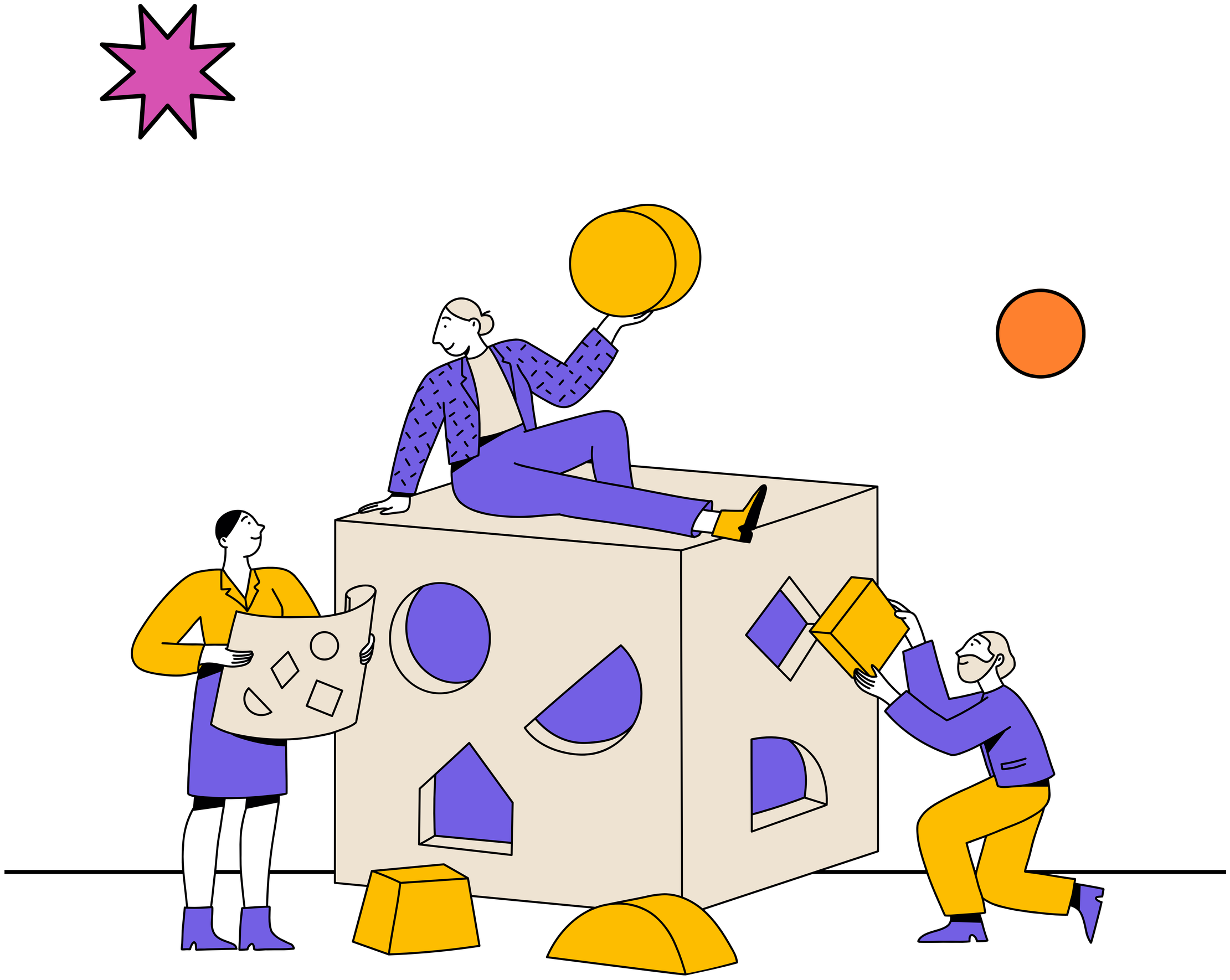


## 81% of companies say better training boosts productivity

Improving processes, skills, and competency training is crucial for enhancing productivity within organizations. By investing in these areas, companies can unlock their team's full potential and drive better performance.

## High-performing teams use three times more sales tech

High-performing sales teams leverage nearly three times the amount of sales technology compared to their underperforming counterparts. This strategic use of technology enables them to enhance efficiency, streamline processes, and ultimately drive better sales results.



# SALES TOOL INTEGRATION TO TRIM YOUR TECH STACK

Many sellers struggle to integrate multiple sales tools into their workflows, limiting productivity. Embracing AI and CRMs is vital for enhancing efficiency and streamlining operations, as CRMs provide a single source of truth.

## 63% use ten or more tools, but sellers integrate fewer

Many organizations have an abundance of tools for sales activities, yet sellers often struggle to incorporate them effectively into their routines. This disconnect can hinder productivity and limit the potential benefits of these resources.

## 76% of businesses expect AI to impact operations

The anticipated impact of AI on daily operations underscores the growing reliance on technology in the workplace. As organizations prepare for these changes, adapting to AI integration will be crucial for maintaining efficiency and competitiveness.

## Key AI uses: call analysis (58%), rep support (54%), training (51%)

AI is transforming sales by helping reps analyze call recordings and respond to customer queries more effectively. Additionally, it provides tailored training recommendations, boosting overall productivity.

## By 2028, 60% of B2B sales tasks will be AI-driven

By 2028, 60% of B2B sales tasks are anticipated to be conducted through conversational user interfaces using generative AI. This shift highlights the growing reliance on technology to enhance sales processes and improve efficiency.

# THE ROLE OF CUSTOMER SERVICE IN RELATIONSHIP MANAGEMENT

Customer service plays a pivotal role in relationship management by fostering trust and loyalty among customers. By delivering exceptional support and addressing needs promptly, businesses can transform one-time buyers into long-term advocates.

**68% of consumers pay more for great service**

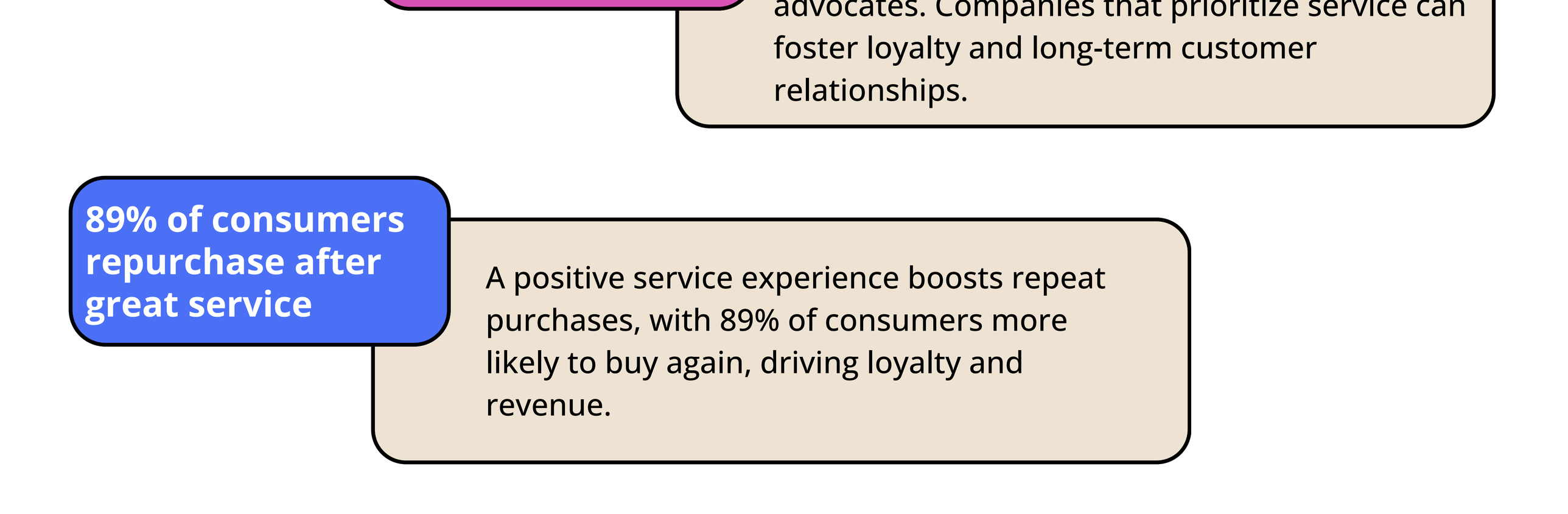
68% of consumers will pay more for great service, highlighting the need to invest in customer support for loyalty and sales.

**Good customer service turns 86% of clients loyal**

Exceptional customer service has the power to turn one-time buyers into lifelong brand advocates. Companies that prioritize service can foster loyalty and long-term customer relationships.

**89% of consumers repurchase after great service**

A positive service experience boosts repeat purchases, with 89% of consumers more likely to buy again, driving loyalty and revenue.



**93% of customers return for excellent service**

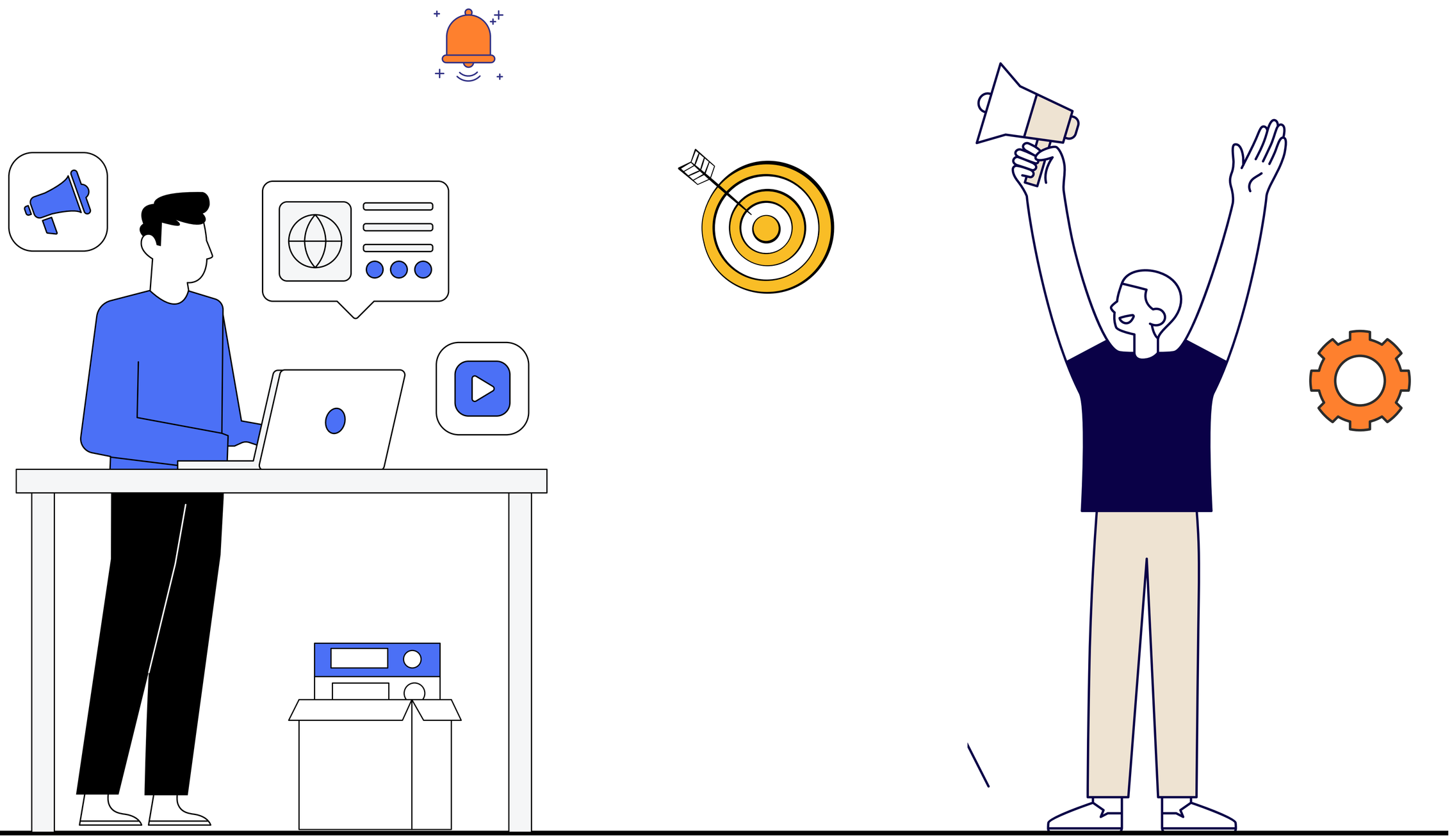
Great customer service boosts loyalty, with 93% of consumers likely to repurchase from brands that prioritize the customer experience.

**80% of companies use satisfaction scores to improve experience**

Most companies track customer satisfaction to identify improvement areas and enhance the overall customer experience.

**72% of companies say analytics improve customer experience**

72% of businesses see analytics as key to improving customer experience, using data insights to boost engagement and satisfaction.



# NAVIGATING THE CHALLENGES OF CROSS-FUNCTIONAL TEAM ALIGNMENT

Cross-functional team alignment is crucial for maximizing sales effectiveness, yet many organizations face significant challenges in achieving this goal. Understanding the key obstacles can help teams implement strategies to foster better collaboration and drive improved results.

**Aligned sales and marketing teams boost efficiency by 67%**

This alignment streamlines processes and reduces friction between departments.

**Aligned sales and marketing boost growth by 19% with 15% more profit**

This synergy drives better financial performance and sustainable growth.

**Aligned sales and marketing teams triple acquisition success**

Effective collaboration enhances customer outreach and engagement strategies.

**22.1% say alignment helps close more deals**

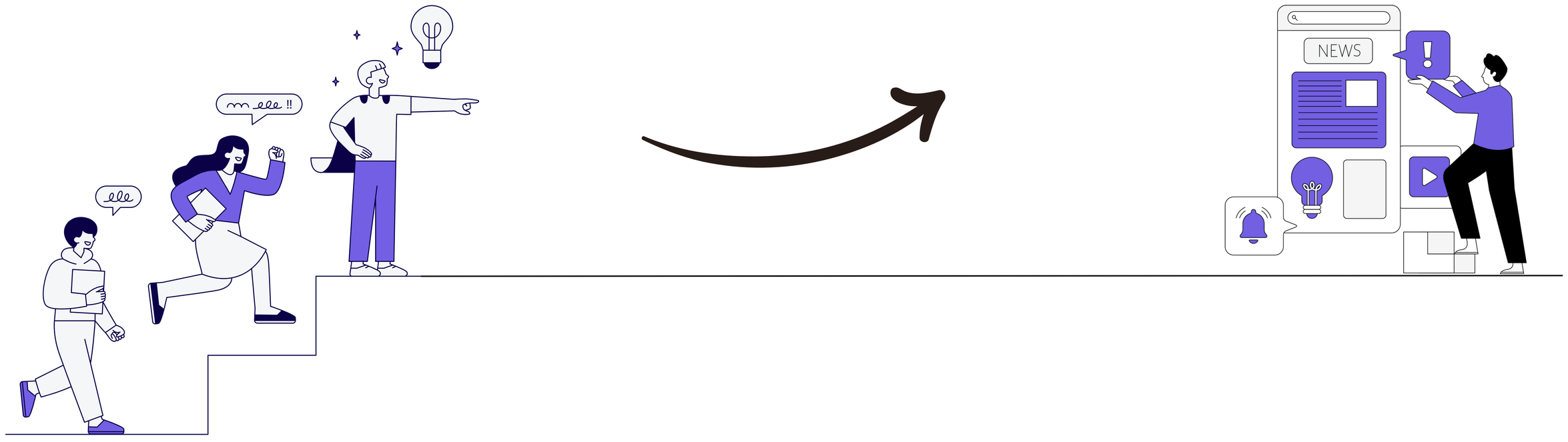
This cooperation ensures a smoother sales process and higher conversion rates.

**20.3% of teams see win rates rise with alignment**

Unified efforts lead to more successful pitches and competitive advantages.

**Aligned teams increase retention by 36% and lifetime value by 20%**

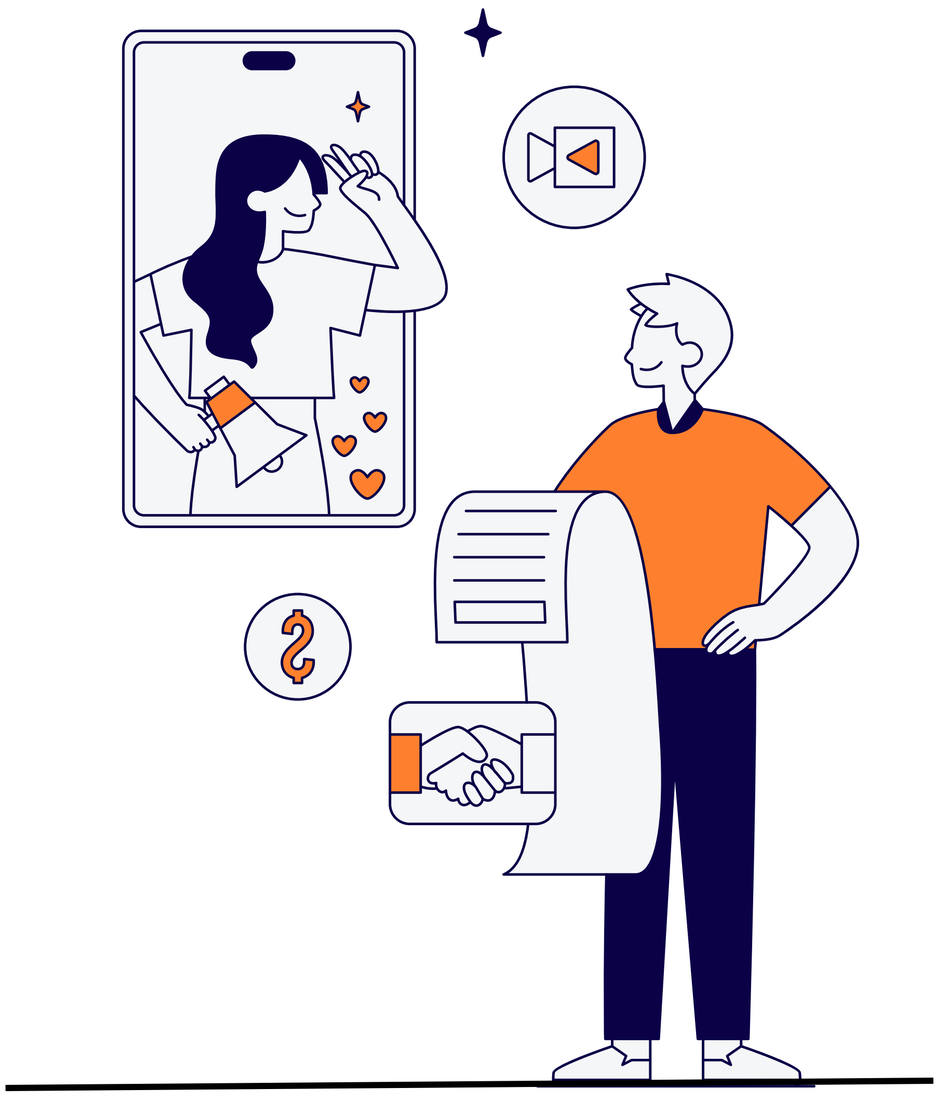
This partnership fosters long-term customer relationships and loyalty.



# RECLAIM PRODUCTIVITY AND LEVERAGE THE POWER OF CONNECTION WITH CONVERGEHUB

## Powering Business Synergy

ConvergeHub is a cutting-edge CRM solution that adapts to your unique business needs. Our flexible platform can be tailored to match your specific requirements, streamlining customer relationships and business processes. With ConvergeHub, you're not just getting a CRM - you're gaining a customizable powerhouse that evolves with your business, ensuring that your customer management tools are always perfectly aligned with your goals.



## Features That Deliver

Unlock collaborative sales features of ConvergeHub for your teams to streamline workflows and enhance performance. These tools empower your customer management force to work together efficiently and close deals faster.

- Contact Management Tools
- Lead Management Solutions
- Salesforce Automation Functionalities
- Marketing Automation Features
- Customer Service Management Tools
- Reporting and Analytics Features
- Seamless Integration with your favorite tools in ConvergeHub's AppStore



# GET IN TOUCH WITH US!

Have questions? We're here to help!



**Visit our website at**

www.convergehub.com

**Reach out via email at**

info@convergehub.com

**Call us at**

+1 510 924 1683
for immediate assistance!

## REPORT METHODOLOGY

ConvergeHub conducted a survey of sales professionals from various B2B and B2C organizations. The participants represented a diverse range of industries and were located across several key regions, including the U.S., UK, and Canada. We also analyzed data and statistics from industry-leading reports. This approach gave us a deeper understanding of current sales trends, challenges, and opportunities. Some names to mention:

- Forbes
- Mindtickle
- Spotio
- Close
- Salesforce
- Qwilr