

# The future of sales

An EY point of view

June 2025



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# Objective

Provide an overview of the future of sales including details on the approach, key use cases, common challenges and practical steps to get started, designed to illustrate how we plan to modernize engagement, drive efficiency and deliver more value to our customers.

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# 1

## Burning platform for change





# Speed is the new normal and AI is the enabler

Megatrends shaping our economy and day-to-day life introduce speed and constant change at every turn.

## Customer trends

### **Cost-conscious purchasing:**

Buyers are increasingly focused on cost-saving measures and expect personalized discounts and tailored strategies.

**Outcome-based value:** Customers are holding sellers accountable for achieving target business outcomes through their products or services.

### **Experience-driven demand:**

Customers are increasingly valuing experiences over products and expect that to translate to their buying journey.

## Technology Trends

### **Rapid advancement of technology:**

Continuous innovations in artificial intelligence (AI), machine learning and automation are constantly evolving.

### **Composable and modular tech stacks:**

The shift from monolithic enterprise systems to composable architectures allows organizations to plug and play best-in-class tools as business needs evolve.

### **Heightened focus on spending efficacy:**

Business partners are prioritizing the need for greater returns on internal technology investments, calling for robust business cases to ensure they drive meaningful value.

## Enterprise trends

### **Eliminated silos and enabled cross-training:**

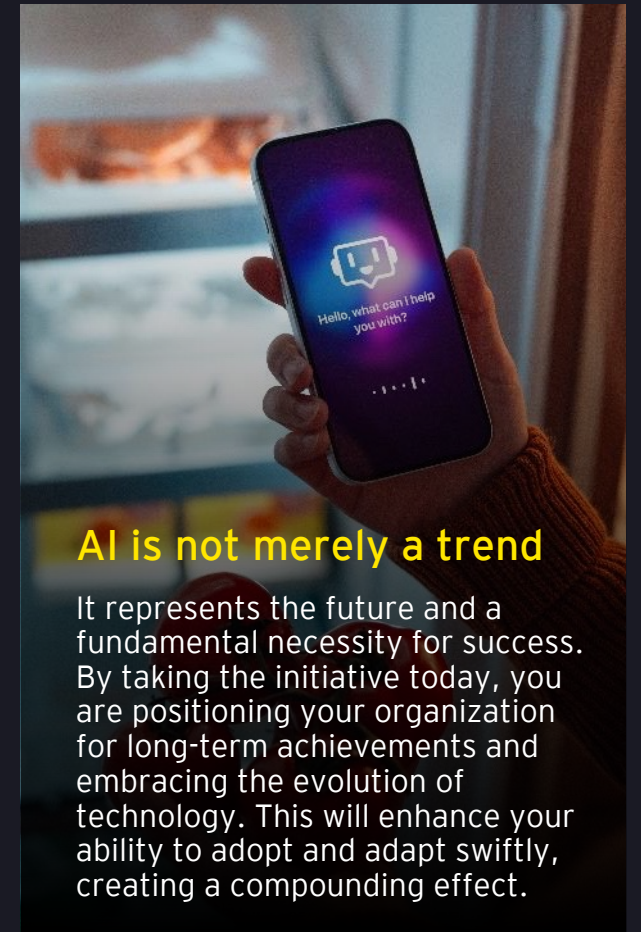
New focus on breaking down departmental barriers and promoting cross-training, fostering collaboration and agility within the workforce.

### **Accelerated product lifecycles:**

Through data-driven Insights, enterprises are streamlining product development, enabling faster innovation and quicker responses to market demands.

### **Empowered self-service and partner channels:**

By adopting self-service solutions and optimizing partner channels, companies enhance customer satisfaction while reducing operational costs.



## AI is not merely a trend

It represents the future and a fundamental necessity for success. By taking the initiative today, you are positioning your organization for long-term achievements and embracing the evolution of technology. This will enhance your ability to adopt and adapt swiftly, creating a compounding effect.

# How have digital AI systems evolved?

## Predictive AI

AI models forecast the future based on patterns or historical data.

Next-best action

Recommendation systems

Traditional chatbots

## Generative AI

Understand and generate human-like text through human prompting; ability to process multimedia communication (image, video, audio, text).

Text generation

Image generation

Personalized email campaigns

## Agentic AI

Anticipates future outcomes and takes autonomous action based on real-time data and learned behavior.

Voice-enabled opportunity entry and management

Dynamic pricing strategies

Automated sales assistants

# The future of sales is changing for everyone at every touch point

Imagine a world where a ...

## Seller

... taps into the collective expertise of sales, product, marketing and service teams – leveraging enterprise-wide insights and third-party data to inform decisions, enhance business outcomes and minimize administrative burdens



## Customer

... can purchase from whomever they choose, whenever and wherever they desire, all while having the confidence that they will receive the right solutions to achieve their desired business outcomes



## Business

... strategically deploys resources to enhance effectiveness, shorten the sales cycle, foster stronger partner relationships and eliminate uncertainty in product offerings, all while freeing itself from the burden of technical debt



# From fragmented approaches to seamless, flexible, customer-centric solutions

**From** working in isolated functional and regional silos that hinder personalized selling

**To** enabling real-time collaboration among customers, sellers, partners and agents, supported by AI-driven logic for approvals and time prioritization

**From** using outdated segments with a one-size-fits-all approach

**To** connecting customers with the sellers they prefer through hyper-curated experiences across marketing, sales and service

**From** investing heavily in outdated, inflexible systems

**To** seamlessly operating within an orchestration layer that delivers timely information and integrates training, coaching, content and data into the sales process, allowing sellers to focus on selling

**From** depending on incomplete customer feedback and unclear product development costs

**To** continuously adjusting product pricing, features and configurations in real time, guiding sellers and shaping the product roadmap without guesswork

**From** competing for control over the partner ecosystem

**To** eliminating barriers and enabling agent orchestration, focusing on finding the right solutions that achieve desired customer outcomes



# 2

## Envisioning the future of sales



# Five core tenets are shaping the future of sales

## Radical reduction in complexity

... in technology, processes and products to increase operational efficiency.

## Collaboration unleashed

... through natural workspace enablement that allows for co-creation between agents, customers, sellers and systems.

## Treatment reigns

... over segmentation, allowing for infinite treatment options to give the customer the hyper-personalized experiences they expect.

## Real-time product optimization

... takes the guesswork out of product spend and automatically suggests, sunsets, or develops products and/or features.

## Power of partners ignited

... refocuses the dialogue from control to optimizing the outcomes for customers with proper safeguards in place.

### This looks like ...

- Emphasizing saving licensing costs over technical debt
- Unifying all data and systems through an orchestration layer
- Streamlining automated smart deal approvals
- Integrating onboarding and training in the sales workflow

- Eliminating barriers between customers, sellers, partners and agents
- Fostering natural, collaborative workspaces for all teams
- Coaching and supporting sales in real time
- Self-service sales available to all customers and agents

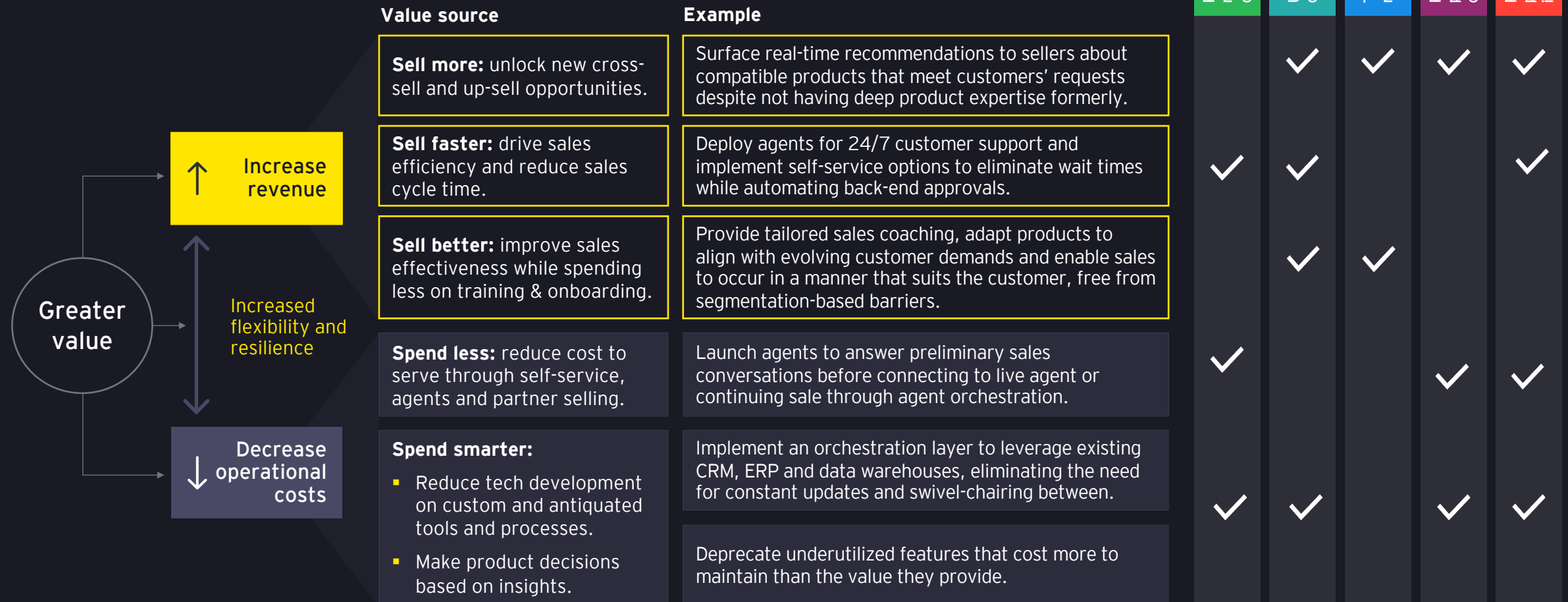
- Focusing on individuals, not accounts
- Offering “infinite” ways to sell and be sold to
- Matching sellers to customers based on preferences, traits, etc.
- Providing industry expertise for all reps, all industries in real time

- Real-time adjustment of product mix, features, pricing and configurations based on live data
- Incorporation of digital twins to test products
- Adaptations based on global vs. localized product
- Pricing optimization based on customer sentiment

- Agent-to-agent and deal orchestration web
- Smart product bundles to maximize customer outcomes and org. value
- Coordinated adoption intervention support
- Joint training and approved rules of engagement

# A resilient enterprise powered by AI increases organizational value

Value tree: source of incremental value derived in the future of sales from the five tenets





# AI capabilities are present across the sales lifecycle and have various degrees of transformation

The EY Customer Engagement Model provides a grounding to how the seller engages with the customer and where AI capabilities come across five use cases.



While AI capabilities naturally align with various use cases across the sales lifecycle, it's important to note that **there is no one-size-fits-all approach**. These capabilities can overlap and extend beyond the use cases represented here.

A hand is shown interacting with a glowing blue digital interface. The index finger is touching a point where several blue lines radiate outwards, resembling a circuit or data flow. The background is dark and out of focus.

# 3

## Use cases and capabilities

# How AI enables a seller's day-to-day

## Meet Sarah

Sarah the sales rep manages thousands of accounts, making it difficult to **pinpoint potential buyers**, assess where they are in the **purchasing process** and understand each **account's strategy and potential**.

She also faces challenges with **quoting, identifying tailored product recommendations and ensuring customer satisfaction**.

With such a broad portfolio, it's tough to stay knowledgeable about the full range of products and services and **determine which ones best fit each customer's needs**.

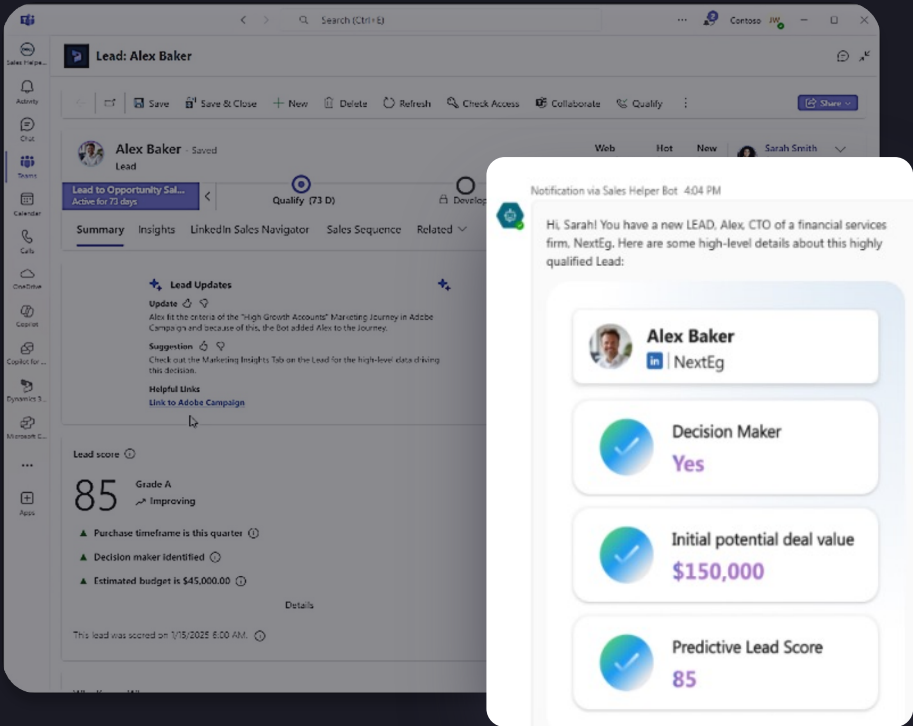




# Streamlining prospecting and interactions

- Al-prioritized leads **highlight the most promising accounts** based on buyer intent, engagement signals and purchase history for Sarah.
- This enables her to **focus her time on high-value opportunities**, tailor outreach more effectively and engage prospects at the right stage of the buying cycle.
- Instead of manually sorting through thousands of accounts, **Sarah can spend more time selling and building relationships, boosting productivity and win rates.**

## AI prioritized leads



### Capabilities enabled:

|                     |                       |                         |
|---------------------|-----------------------|-------------------------|
| Lead management     | Outreach management   | Contact management      |
| Lead scoring        | Customer segmentation | Content personalization |
| Lead prioritization | Account management    | Activity management     |

### Relevant personas:

|                       |                    |                    |                    |
|-----------------------|--------------------|--------------------|--------------------|
| ✓ Field/outside sales | ✓ Account managers | ✓ Sales executives | ✓ Sales engineer   |
| ✓ Inside sales        | ✓ Customer success | ✓ Sales manager    | ✓ Business dev rep |

# Advancing intelligent sales processes

- Sarah uses AI to **sell smarter and faster** by letting it do the heavy lifting. The system analyzes internal and external data to **generate customized account insights**.
- These insights highlight **key priorities, pain points and potential gaps** in each customer's setup.
- AI then surfaces the most relevant upsell or cross-sell opportunities, helping Sarah tailor her pitch and make **every interaction more impactful**. Instead of going in blind, she enters meetings prepared with data-backed recommendations, allowing her to **focus on building relationships and closing deals**.

Capabilities enabled:

|                        |                    |                      |
|------------------------|--------------------|----------------------|
| Opportunity management | Account management | Guided selling       |
| Quote management       | Sales analysis     | Exception management |
| Pricing management     | Product management | Account planning     |

Relevant personas:

|                       |                    |                    |                 |
|-----------------------|--------------------|--------------------|-----------------|
| ✓ Field/outside sales | ✓ Account managers | ✓ Sales executives | ✓ Sales manager |
| ✓ Legal               | ✓ Customer success | ✓ Sales manager    | ✓ Finance       |

## AI-generated account insights

**Account Plan with Strategic Planning**

**Industry Trends & Insights:**

The financial industry is increasingly driven by technologies like AI, cloud adoption, blockchain, and automation, with leaders such as MoneyMatrix, Royal Financial, and FinConnect embracing these innovations to improve efficiency, customer experience, and security. Meanwhile, companies like Heritage Bank Corp and Community Trust lag behind, relying on outdated systems and struggling to integrate new technologies. Financial leaders are adopting AI for predictive analytics, blockchain for secure payments, and cloud-native infrastructure for agility, while focusing on cybersecurity to protect customer data.

For **NextEg** to stay competitive, Dell can support their digital transformation by providing scalable hybrid cloud solutions, AI-driven analytics, RPA for automation, and comprehensive cybersecurity tools, while offering training to ensure smooth adoption and innovation.

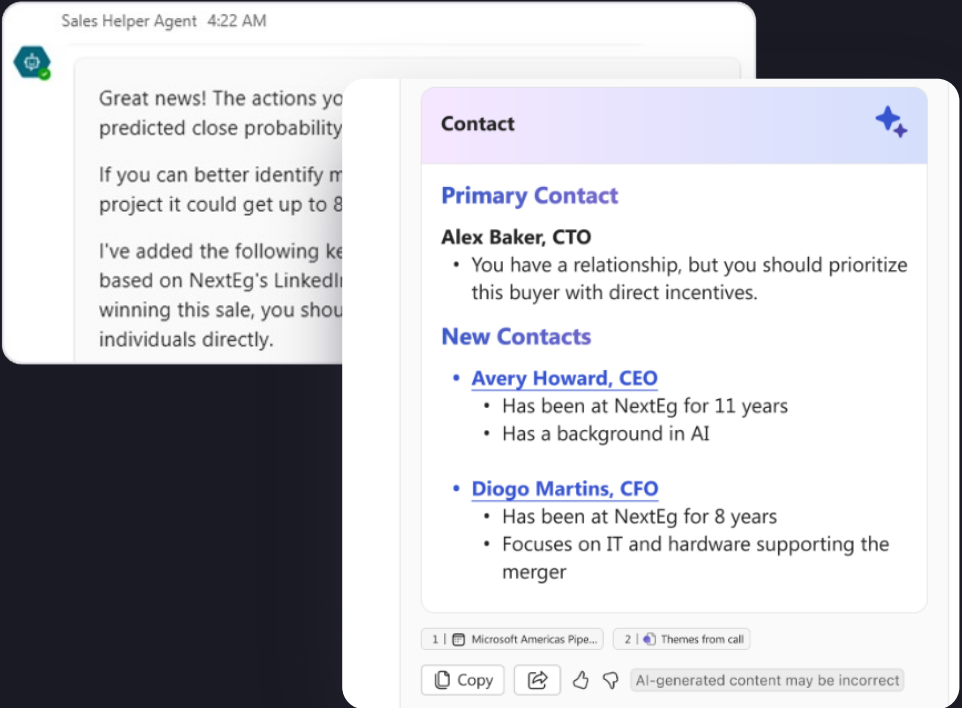
**Current Year Plan:**

- **Objectives:**
  - Standardize Hardware and Software Across All Employees
  - Reduce Shadow IT by Centralizing IT Procurement and Management
  - Centralize the Storage of Documents and Information for Improved Collaboration and Security
  - Enhance IT Support and Maintenance for Standardized Systems
  - Drive Employee Adoption of Centralized IT Tools and Systems
  - Monitor and Continuously Improve IT Systems and Processes
- **Strategies:**
  - Implement a Unified IT Governance Framework
  - Centralized IT Infrastructure and Training Program
  - Proactive Shadow IT Management and Risk Mitigation
- **Indicators and targets**
  - **Indicators:**
    - Percentage of employees using standardized hardware and software.
    - Number of devices and software configurations that meet the standard.
    - Compliance rate with IT standards (e.g., operating systems, productivity tools).
  - **Targets:**
    - 100% of employees using approved and standardized hardware/software by end of fiscal year 2025.
    - Reduction in the number of unsupported or non-standard devices/software by 20% within 12 months.

# Elevating the seller experience

- **AI-powered opportunity projections** help Sarah focus on the **right deals at the right time**.
- Instead of guessing which accounts to prioritize, AI analyzes buying signals and past behavior to **inform close percentages** and recommends the best actions to take, such as **additional contacts to engage**.
- With clear guidance, Sarah **boosts her efficiency, personalizes her outreach and drives stronger sales outcomes**.

## Opportunity projections and recommendations



Capabilities enabled:

|                        |                     |                            |
|------------------------|---------------------|----------------------------|
| Account planning       | Pipeline management | Sales enablement           |
| Account management     | Sales planning      | Sales analysis & reporting |
| Opportunity management | Forecasting         | Demand generation          |

Relevant personas:

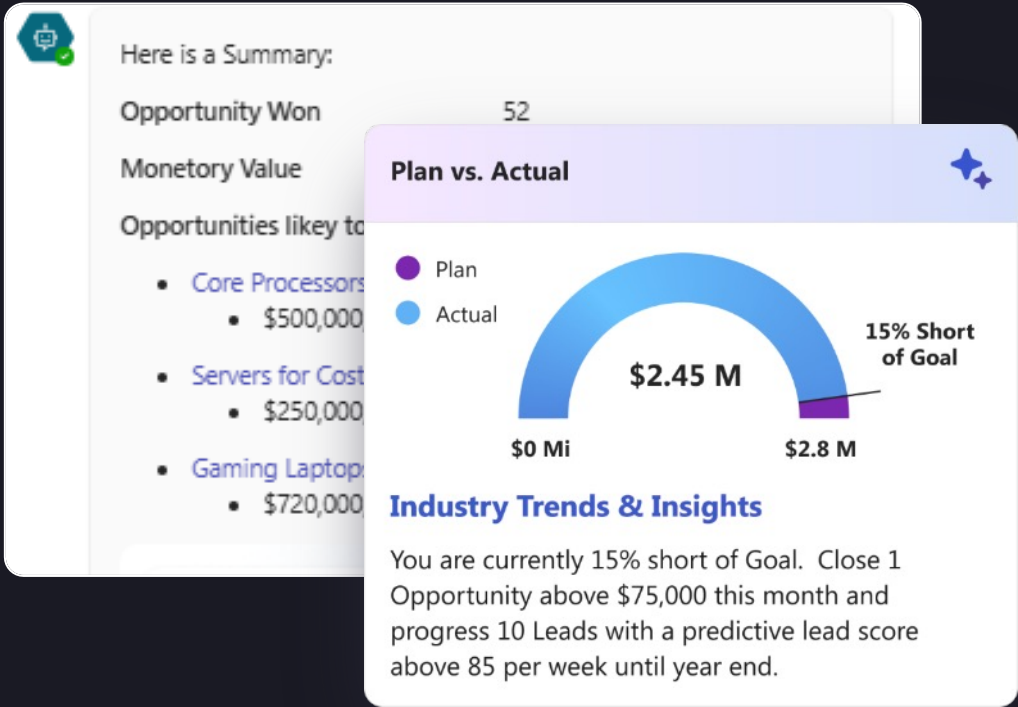
- |                       |                    |                    |
|-----------------------|--------------------|--------------------|
| ✓ Account managers    | ✓ Sales executives | ✓ Sales manager    |
| ✓ Field/outside sales | ✓ Customer success | ✓ Sales operations |



# Elevating sales engagement

- **On-demand sales reporting** gives Sarah instant visibility into her **performance in a timely fashion**.
- Instead of manually pulling data or waiting on reports, she **can quickly see how she's tracking against her targets**.
- With real-time insights, Sarah easily **understands where she sits against her goals**, identifies gaps, adjusts her approach and plans next steps with confidence, all in a **fraction of the time**.

## On-demand sales reporting



### Capabilities enabled:

|                    |                     |                            |
|--------------------|---------------------|----------------------------|
| Sales enablement   | Training management | Sales analysis & reporting |
| Content management | Forecasting         |                            |
| Onboarding         | Sales planning      |                            |

### Relevant personas:

|                               |                    |                    |                    |
|-------------------------------|--------------------|--------------------|--------------------|
| ✓ Sales ops                   | ✓ Account managers | ✓ Sales executives | ✓ Sales engineer   |
| ✓ Sales reps (inside/outside) | ✓ Customer success | ✓ Sales manager    | ✓ Business dev rep |

# Next-generation service

- **AI sentiment analysis** analyzes facial expressions and voice cues to detect tone and emotional shifts – flagging frustration, interest or satisfaction. This gives **Sarah real-time insights into how the conversation is landing.**
- With this awareness, she can adjust her approach on the spot, addressing concerns **proactively and keeping the conversation on track.**
- Sarah can now respond faster, tailor her approach and strengthen relationships, **leading to higher customer satisfaction and better sales outcomes.**

## Sentiment analysis



### Capabilities enabled:

|                    |                         |                         |
|--------------------|-------------------------|-------------------------|
| Account management | Outreach management     | Contact management      |
| Account planning   | Customer segmentation   | Content personalization |
| Renewal management | Customer lifetime value | Activity management     |

### Relevant personas:

|                    |                       |                    |                 |
|--------------------|-----------------------|--------------------|-----------------|
| ✓ Customer success | ✓ Account managers    | ✓ Sales executives | ✓ Sales manager |
| ✓ Sales ops        | ✓ Field/outside sales | ✓ Sales manager    | ✓ Business dev  |

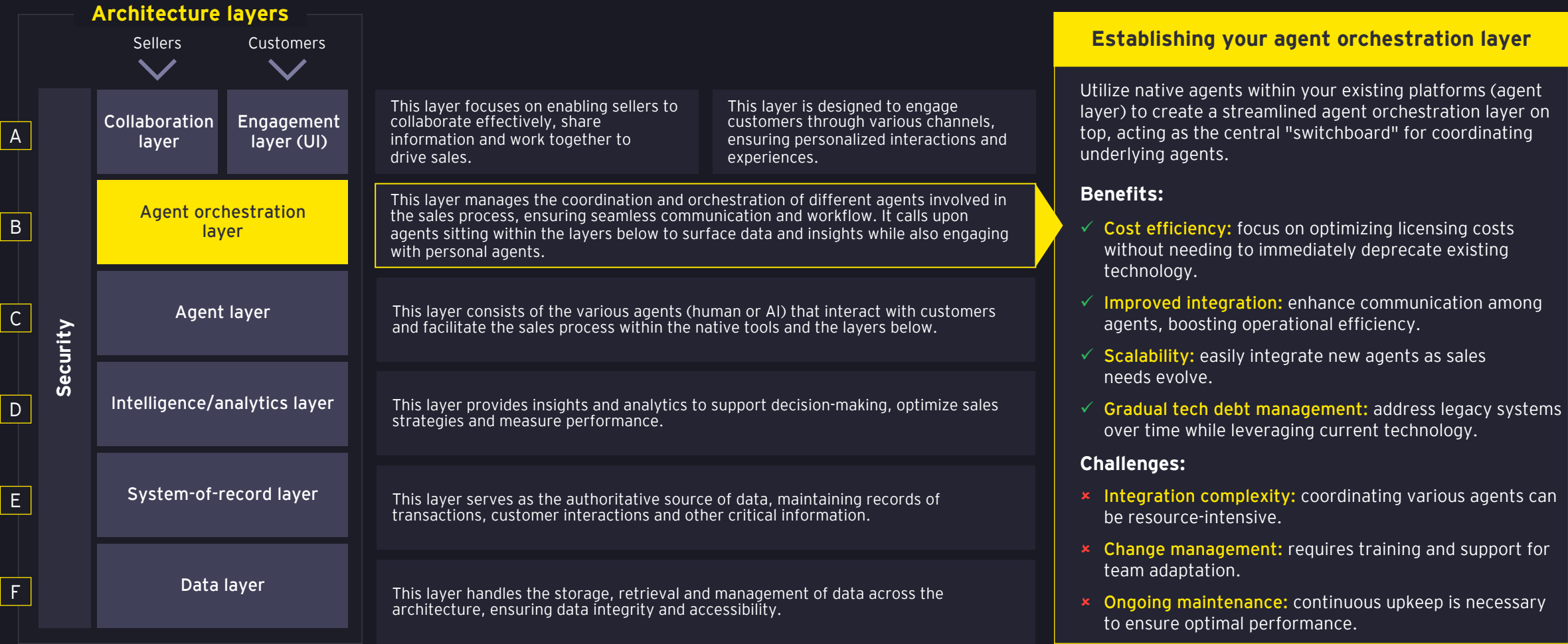


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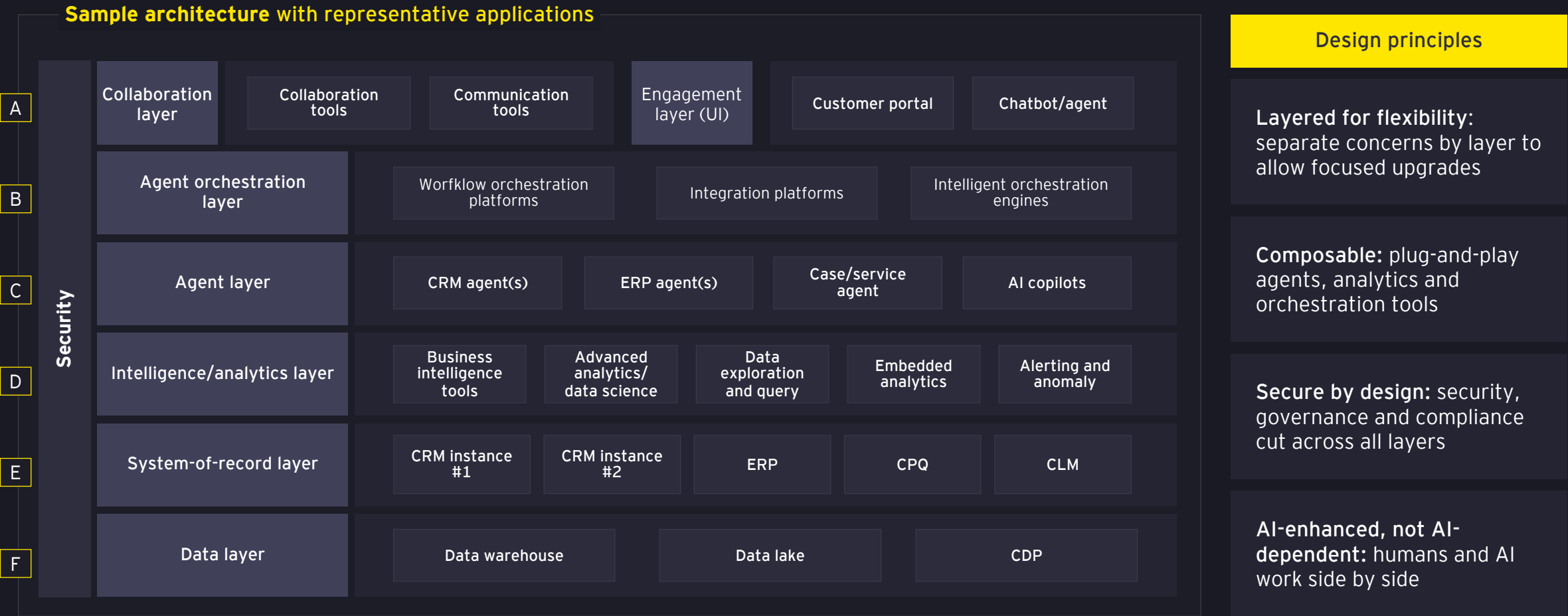
## Technical architecture and feasibility



# The agent orchestration layer in the future-state architecture empowers agents to engage in intelligent decision-making



# Design principles and sample architecture for a flexible, composable and secure framework featuring an agent orchestration layer



# 5

## Challenges and getting started





# While navigating the future of sales, common obstacles prevent progress

## Bringing along the people

Resistance to change, skill gaps and data overload may hinder the adoption of new technologies. Employees may struggle to trust data and relinquish control of their client relationships, leading to cultural shifts and communication barriers.

## Reliability of data

Inaccurate or incomplete data can lead to misguided strategies, misallocation of resources and, ultimately, lost sales opportunities. As sales teams integrate advanced analytics and AI tools, the need for high-quality, trustworthy data becomes paramount.



## Navigating internal red tape

Legacy bureaucratic processes can slow decision-making and lead to missed opportunities. Concerns about compliance, data privacy and security often result in lengthy approval procedures, while involvement from multiple departments can create silos and conflicting priorities.

## Balancing duality of growth

The delicate balance of investing in future technology with the need for operational efficiency presents a significant challenge. Organizations must develop a strategic approach that integrates technology investments with ongoing operational improvements, ensuring that both aspects work in harmony to support sustainable growth.

# Jump the S-curve and get started on your AI journey, no matter where you are today

## Where are you on the enterprise AI adoption journey?

0

### Level 0: No use

- No or limited adoption of AI technologies or practices
- Lack of awareness or implementation of AI across functions
- Intimidated by red tape and legal compliance requirements that dilute value

1

### Level 1: Experimentation

- Beginning to explore AI technologies through pilot projects or experiments
- Focus on understanding potential benefits and limitations of AI, often in isolated departments
- Lack of clear ownership for ongoing maintenance of AI roadmap

2

### Level 2: Integration

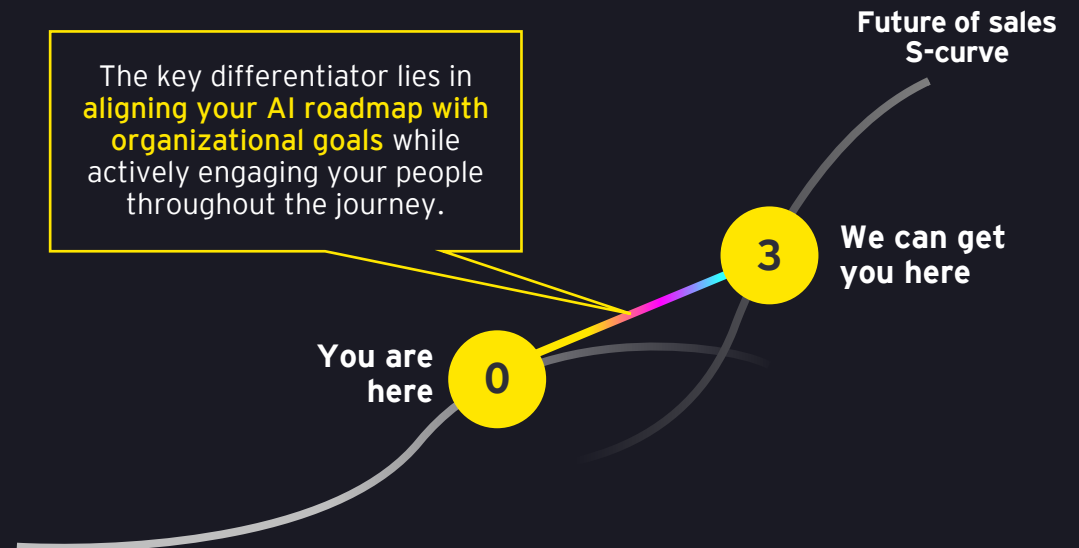
- AI is being integrated into core processes and workflows
- Multiple departments adopting AI solutions to enhance efficiency, decision-making and customer experiences
- Supported by established data infrastructure and governance

3

### Level 3: Transformation

- AI is deeply embedded in the organization's culture and operations
- Leveraging AI for strategic decision-making and innovation
- Prioritizing continuous improvement and scaling of AI initiatives
- Emphasis is on ethical practices and data-driven insights

Getting started with AI today can lead to significant advancements in achieving your organizational goals, ensuring that you stay ahead of the competition and maximize your results.



### Let's talk.

Our transformation team can help you execute your business-led, experience-driven and tech-enabled transformation to jump the S-curve on AI adoption.

# Contact us



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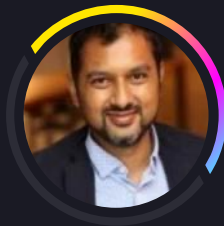
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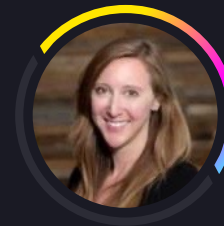
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2504-11133  
EYG no. 005258-25Gbl

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