

The Total Economic Impact™ Of Salesloft

Cost Savings And Business Benefits Enabled By Salesloft

A Forrester Total Economic Impact™ Study
Commissioned By Salesloft, April 2025

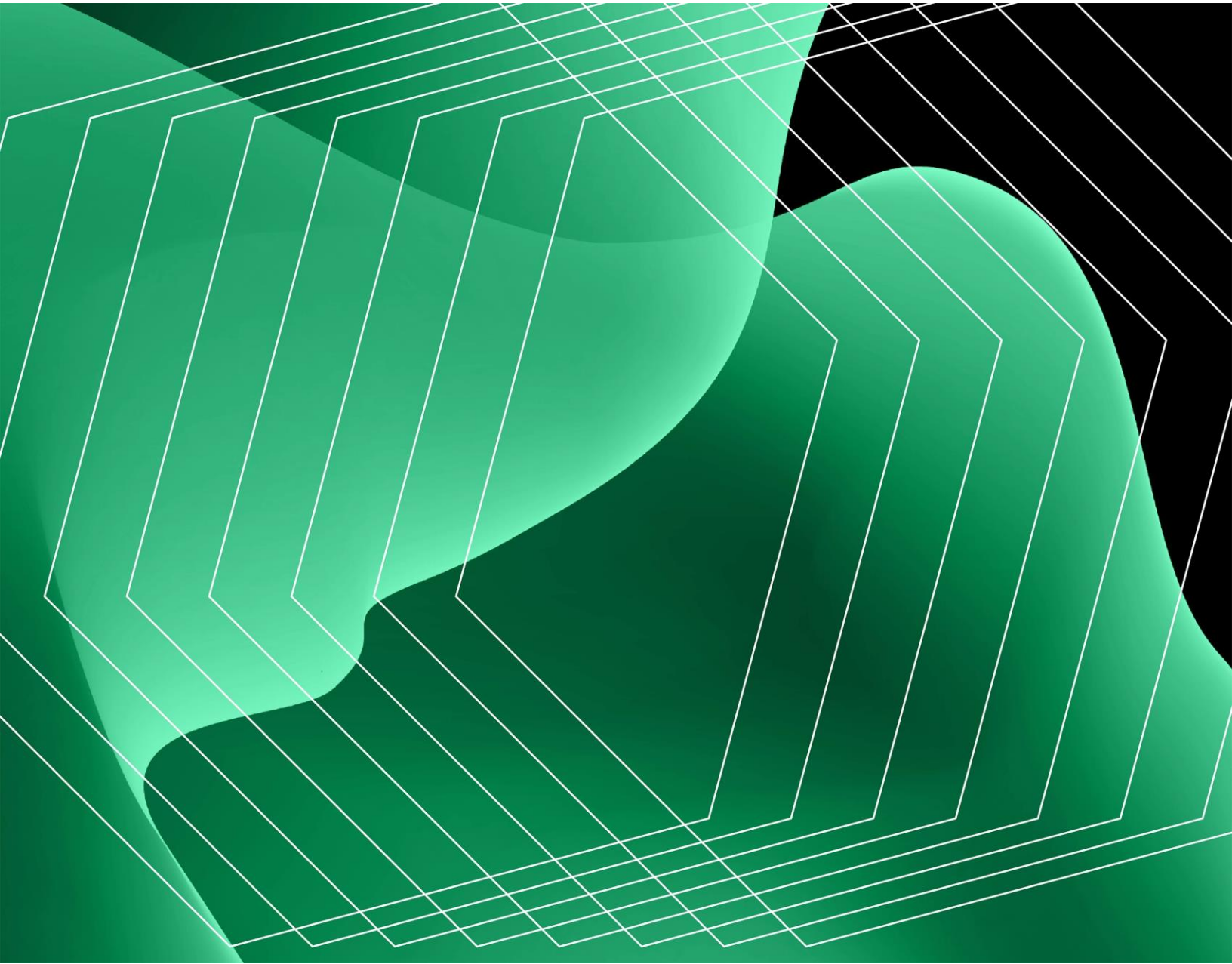


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ABOUT FORRESTER CONSULTING

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Executive Summary

Amid economic challenges and evolving B2B buyer behavior, revenue leaders and their organizations are facing increasing pressure to improve performance, be more cost efficient, and better utilize technology, including AI. Given budget pressures, Forrester recommends that revenue operations leaders invest in core areas that bolster the foundations of growth, which includes revenue orchestration platforms.¹ Organizations can use a revenue orchestration platform like Salesloft to enable effective buyer engagement, optimize internal revenue generation processes, and improve sales performance and productivity.²

[Salesloft](#) is an AI-powered revenue orchestration platform that captures, prioritizes, and operationalizes data from billions of buyer-seller interactions and buying signals within the platform and across its integration marketplace. It enables businesses to engage buyers, generate pipeline, accelerate deal velocity, and ultimately close more business. Salesloft powers revenue growth and predictability and helps thousands of organizations worldwide scale their revenue operations. The platform unifies previously disconnected technologies across the entire buyer-seller journey, integrating CRM data with tools for conversational AI chat, sales engagement, revenue intelligence, conversational intelligence, deal management, sales coaching, and forecasting — all supported by AI-driven workflows and agents.

Salesloft commissioned Forrester Consulting to conduct a Total Economic Impact™ (TEI) study and examine the potential return on investment (ROI) enterprises may realize by deploying Salesloft.³ The purpose of this study is to provide readers with a framework to evaluate the potential financial impact of Salesloft on their organizations.



Return on investment (ROI)
236%



Net present value (NPV)
\$26.69M

To better understand the benefits, costs, and risks associated with this investment, Forrester interviewed four decision-makers with experience using Salesloft. For the purposes of this study, Forrester aggregated the interviewees' experiences and combined the results into a single [composite organization](#) that is a global B2B enterprise with annual revenue of \$7 billion and a distributed revenue organization of 1,500 people.

EXECUTIVE SUMMARY

Interviewees said that prior to using Salesloft, their organizations typically did not have a revenue orchestration platform; instead, they had no solution, mixed tooling, or manual operations. Previous attempts to implement such a system yielded limited success, leaving them with reduced visibility, poor data quality, unpredictability, disjointed tooling, and inefficient revenue organization. These limitations led to fewer sales opportunities and smaller pipelines, resulting in fewer deals and lower revenue. This ultimately caused a decrease in operating profit and inconsistent organizational goal achievement.

After the investment in Salesloft, many interviewees' organizations saw an impact within the first six months, maturing their revenue organizations and achieving a performance force multiplier. These organizations experienced value through several key multipliers across various operational aspects. For example, they achieved people multipliers through improved efficiency that enhanced productivity across teams. Opportunity multipliers emerged from improved visibility and data quality, allowing for more informed decision-making. Organizations realized coverage multipliers through more effective buyer engagement, leveraging AI and personalization to tailor interactions. And they attained speed multipliers by implementing consistent sales processes built on best practices, which were aided by Salesloft's support, education, and services. Key results from the investment included increases to opportunities, closed/won deals, cost savings, operating profit, and durable revenue.

“Salesloft provides not only a sales [engagement] tool, but a revenue [intelligence] source of truth. That is what we were looking for.”

SENIOR REVENUE OPERATIONS MANAGER, COMMERCE

182%

Percentage more revenue with Salesloft (Year 3, excluding renewals)

KEY FINDINGS

Quantified benefits. Three-year, risk-adjusted present value (PV) quantified benefits for the composite organization include:

- **Increased operating profit from improved sales effectiveness due to a 20% improved response rate and a 50% improved conversion to opportunity rate.** The composite organization uses the Salesloft platform — including Rhythm for agentic workflows, Cadence for sales engagement, Conversations for conversational intelligence, and Coaching for sales coaching — to engage at scale more effectively and consistently throughout the buyer lifecycle and convert more sales activity into opportunities. The composite’s sellers more effectively engage with buyers when they receive key insights detailing who is in market, the context of their needs, what actions to take, when to take them, and why. With increased opportunities from a consistent level of sales activity and a streamlined workflow to engage buyers at the right moment, the composite organization closes deals faster and more predictably. By leveraging Salesloft, it gains visibility into deal status, identifies risks, and has the workflows in place to act on these insights, which drives greater revenue. Over three years, this benefit is worth \$12.4 million in operating profit to the composite organization.
 - **Increased operating profit from increased selling activity with 40% more activity to maximize market opportunities.** In addition to improved sales effectiveness, the composite organization uses Salesloft to complete more calls, emails, and other sales activities with a steady number of salespeople throughout the buying lifecycle, reaching more buyers with the right engagement. Salesloft’s sales engagement and agentic workflows enable the composite organization’s team to drive optimal seller actions and build AI-powered outbound engagement sequences, resulting in more opportunities generated consistently and efficiently. With a larger and more predictable pipeline supported by Salesloft, the composite organization closes more deals and achieves greater revenue. Over three years, this benefit is worth \$10.9 million in operating profit to the composite organization.
 - **Increased operating profit from improved opportunity management with a 12% higher closed/won rate.** The composite organization not only generates more opportunities and pipeline due to Salesloft but also converts a higher percentage of these opportunities into closed/won deals. Salesloft’s conversational intelligence
-

provides valuable insights by distilling information from conversations and linking it to relevant opportunities. This feature enables the composite's sellers to act on those insights and improve deal outcomes, while sales managers can identify risks and opportunities within specific deals and leverage teachable moments effectively. These activities, combined with Deals for deal management, agentic workflows, and sales coaching capabilities, enable the composite organization to improve its consistency at scale, drive more closed/won deals, and increase revenue. Over three years, this benefit is worth \$4.4 million in operating profit to the composite organization.

“Salesloft helped us get \$75 million in new business sales pipeline generation and about \$10 million in annual contract value closed.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

152%

Percentage more opportunities and pipeline with Salesloft (Year 3)

- **Increased operating profit from improved customer loyalty with a 1.3% improved renewal rate.** The composite organization benefits from using Salesloft throughout the buyer lifecycle, including for deal renewals. With Salesloft, it increases and improves engagement with current customers and better manages deal renewals, leading to higher customer retention, more renewed deals, and increased revenue. Over three years, this benefit is worth \$2.3 million in operating profit to the composite organization.

- **Team productivity and performance benefits with 32% improved coaching productivity and 10% improved administrative productivity.** The composite organization's entire revenue team benefits from its investment in Salesloft. Its managers coach salespeople more effectively and efficiently with Salesloft's conversational intelligence and coaching capabilities, saving time on manual work and driving better sales outcomes. Salesloft helps the composite's managers home in on the most relevant opportunities and help salespeople succeed. Additionally, coaching sessions are more productive with less preparation required due to AI meeting agents. Its salespeople also save time on manual work with agentic workflows, integrations, Conductor AI, and the rest of the Salesloft platform. Salesloft's AI workflows connect to a broad integration ecosystem, giving the composite's salespeople a complete and prioritized view of the most important actions to get deals done and maximizing efficiency. This feature enables the revenue team to better allocate their time toward higher value activities that align with the organization's goals. Over three years, this benefit is worth \$6.8 million to the composite organization.

“Salesloft has been tremendously impactful. It is constantly improving and helps us see better results year over year. ... We cannot imagine a world without Salesloft.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

- **Technology optimization cost savings of \$1.3 million over three years.** After investing in Salesloft as a comprehensive revenue orchestration platform for the entire buyer lifecycle, the composite organization simplifies and consolidates its revenue technology stack by retiring point solutions that it no longer needs.

“Salesloft organizes and improves efficiency within our sales teams, and it provides the detail and the data for us to manage and coach those individuals.”

HEAD OF SALES OPTIMIZATION, INFORMATION SERVICES

2%

Percentage additional revenue with Salesloft (Year 3, including renewals)

Unquantified benefits. Benefits that provide value for the composite organization but are not quantified for this study include:

- **Improved data quality.** The composite organization improves its data quality by better tracking sales activity and pulling it together with first-party signals, third-party signals, buyer engagement, and its sales methodology. Salesloft helps the composite organization integrate the most critical data sources in its sales ecosystem, resulting in a complete view of buyers and a better understanding of outcome drivers.
- **Increased visibility and insights.** With the investment in Salesloft, the composite organization increases its visibility into revenue organization processes, helping identify gaps across the full sales funnel in one place and gaining greater insights, including AI insights. This enables the composite to better spot risks, focus on the right actions, reduce friction in the buying journey, and drive repeatable revenue.
- **Salesloft support and education.** The composite organization benefits from Salesloft self-service tooling, documentation, and support in addition to Salesloft professional services. This support helps the composite’s team quickly get back to work and spend more time closing deals and achieving goals. It also benefits from education resources and best practices that facilitate and accelerate Salesloft adoption internally.

Flexibility. Salesloft customers might implement Salesloft and later realize additional uses and business opportunities, including:

- **Enterprise-readiness and scalability.** As it grows, the composite organization can scale its Salesloft use across the entire, global revenue organization while meeting compliance requirements.
- **Use with other technology.** The composite organization can integrate Salesloft with its CRM and other interoperable technologies, thereby driving increased use and value from those technologies with Salesloft.
- **Platform growth, including Drift.** With Salesloft's acquisition of Drift, the composite organization can start to realize greater value from using Salesloft and Drift together.

Costs. Three-year, risk-adjusted PV costs for the composite organization include:

- **Salesloft costs of \$8.8 million over three years.** The composite organization pays for Salesloft on a per user basis over three years, and all 1,500 of the composite's revenue organization employees adopt it by Year 3. Additionally, the composite takes advantage of Salesloft professional services for onboarding, implementation, and ongoing optimization.
- **Implementation costs of \$192,000.** The composite organization devotes two full-time roles to implement Salesloft over four months. It takes advantage of Salesloft services, which accelerates the implementation process and reduces the necessary labor.
- **Training costs of \$1.2 million.** Each of the composite organization's Salesloft users receives three hours of initial training followed by refresher training each year, allowing users to maximize their performance. Salesloft services help the composite organization run training sessions and develop custom training materials.
- **Ongoing management and support costs of \$715,000.** To maintain the Salesloft investment, the composite organization invests 25% of four roles per year in ongoing management.
- **Sales enablement costs of \$357,000.** The composite organization also invests 25% of two roles per year for sales enablement purposes.

EXECUTIVE SUMMARY

The representative interviews and financial analysis found that a composite organization experiences benefits of \$38.02 million over three years versus costs of \$11.33 million, adding up to a net present value (NPV) of \$26.69 million and an ROI of 236%.

“Tools like Rhythm use AI to automatically prioritize tasks [that sellers can action on]. It will reduce the administrative burden. [I anticipate a] 10% reduction.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES



Return on investment (ROI)

236%



Benefits PV

\$38.02M



Net present value (NPV)

\$26.69M

Benefits (Three-Year)



TEI FRAMEWORK AND METHODOLOGY

From the information provided in the interviews, Forrester constructed a Total Economic Impact™ framework for those organizations considering an investment in Salesloft.

The objective of the framework is to identify the cost, benefit, flexibility, and risk factors that affect the investment decision.

Forrester took a multistep approach to evaluate the impact that Salesloft can have on an organization.

DISCLOSURES

Readers should be aware of the following:

This study is commissioned by Salesloft and delivered by Forrester Consulting. It is not meant to be used as a competitive analysis.

Forrester makes no assumptions as to the potential ROI that other organizations will receive. Forrester strongly advises that readers use their own estimates within the framework provided in the study to determine the appropriateness of an investment in Salesloft.

Salesloft reviewed and provided feedback to Forrester, but Forrester maintains editorial control over the study and its findings and does not accept changes to the study that contradict Forrester's findings or obscure the meaning of the study.

Salesloft provided the customer names for the interviews but did not participate in the interviews.

Due Diligence

Interviewed Salesloft stakeholders and Forrester analysts to gather data relative to Salesloft.

Interviews

Interviewed four people at organizations using Salesloft to obtain data about costs, benefits, and risks.

Composite Organization

Designed a composite organization based on characteristics of the interviewees' organizations.

Financial Model Framework

Constructed a financial model representative of the interviews using the TEI methodology and risk-adjusted the financial model based on issues and concerns of the interviewees.

Case Study

Employed four fundamental elements of TEI in modeling the investment impact: benefits, costs, flexibility, and risks. Given the increasing sophistication of ROI analyses related to IT investments, Forrester's TEI methodology provides a complete picture of the total economic impact of purchase decisions. Please see [Appendix A](#) for additional information on the TEI methodology.

The Salesloft Customer Journey

Drivers leading to the Salesforce investment

Interviews					
Role	Industry	Region	Revenue	Salesloft services customer	Drift customer
Sales director	Electronics distribution	North America HQ, global operations	\$33 billion	Yes	No
Director, global head of prospecting	Financial services	North America HQ, global operations	\$12 billion	Yes	Yes
Senior revenue operations manager	Commerce	North America HQ, global operations	\$7 billion	Yes	Yes
Head of sales optimization	Information services	Europe HQ, global operations	\$7 billion	Yes	Yes

KEY CHALLENGES

Before Salesloft, interviewees' organizations often had no revenue orchestration solution. Some had a selection of related tools and point solutions and others manually orchestrated their revenue processes. Many of the interviewees created their specific teams within their revenue organizations from nothing and wanted to find the right tools to lead their teams to success.

The interviewees noted how their organizations struggled with common challenges, including:

- **Lack of visibility and poor data quality.** Interviewees told Forrester that their organizations lacked visibility into their revenue processes before Salesloft and existing data was of poor quality. The head of sales optimization for an information services organization said: "[Our sales activity] was completely invisible to management and upward. ... One of the initiatives that drove us into revenue orchestration was to do with tracking. [Revenue orchestration] solves that pain point in the sense that we can start to see visibility and history on [prospects and customers] in one place."
- **Lack of consistency and disjointed tooling.** Interviewees explained how their organizations were challenged to deliver consistent revenue-driving efforts and partially

attributed this to a disjointed tool experience. The senior revenue operations manager for a commerce organization said: “The user experience was just disjointed. We had questions about how merchant activity pulls in with merchant conversations and how to get that connectivity. It was a big focus of revenue operations at the time to make sure that our [user experience] was more seamless and everybody had access to one singular source of truth for revenue engagement.” They wanted to see all their revenue data in one place and act on it.

- **Inefficient revenue organizations.** Interviewees told Forrester how their organizations’ revenue-driving employees faced sales efficiency challenges and therefore sought a more optimal solution. The head of sales optimization for an information services organization said: “[It was] about efficiencies as well. The lack of tooling [before] versus the tooling we have now puts us in a very different place in terms of how much one salesperson can complete.”

Technology Definition

Revenue Orchestration Platforms

Forrester defines **revenue orchestration platforms** as “technology that enables B2B frontline resources to design, execute, capture, analyze, and improve buyer and customer engagement while optimizing productivity and internal revenue processes.”⁴

“We were incredibly old-fashioned. We’ve gone from spreadsheets and notepads to workflows in Rhythm.”

HEAD OF SALES OPTIMIZATION, INFORMATION SERVICES

SOLUTION REQUIREMENTS

The interviewees' organizations searched for a solution that could:

- Offer the necessary revenue orchestration solution capabilities.
- Integrate with their CRM solutions and other tools.
- Provide support and services.

Specifically, the interviewees' organizations opted for Salesloft services to:

- Encourage and maximize adoption.
- Accelerate implementation.
- Serve as a force multiplier for their teams.
- Support them in following best practices.

“We were looking to move toward Salesloft. ... Salesloft is very sticky. They're constantly introducing new features.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

“We wanted to see which tool had the most functionality. [Salesloft's] recording function was a plus. The areas that really stood out for us were Deals and Rhythm.”

SENIOR REVENUE OPERATIONS MANAGER, COMMERCE

COMPOSITE ORGANIZATION

Based on the interviews, Forrester constructed a TEI framework, a composite company, and an ROI analysis that illustrates the areas financially affected. The composite organization is representative of the interviewees' organizations, and it is used to present the aggregate financial analysis in the next section. The composite organization has the following characteristics:

- **Description of composite.** The composite organization is a global B2B enterprise with annual revenue of \$7 billion. It is a large and distributed revenue organization of 1,500 people who focus on the full buyer lifecycle. The composite has a complex organizational structure, has made acquisitions, and must adhere to specific governance requirements. On average, its new business deals are valued at \$150,000 and typically last three years, which translates to an average annual new business deal value of \$50,000. The composite maintains an average operating profit margin of 12%. It is a customer of Drift and Salesloft services.
- **Deployment characteristics.** The composite organization begins using Salesloft in Year 1, following a four-month implementation period. The initial rollout covers 60% of the revenue organization's potential users, which scales to 85% by Year 2 and reaches 100% by Year 3. The composite uses Salesloft professional services to accelerate implementation and user adoption.

Key Assumptions

\$7 billion annual revenue

1,500 revenue organization employees

\$50,000 average annual deal value (new business)

12% operating profit margin

60% user adoption in Year 1, 85% in Year 2, and 100% in Year 3

Uses Salesloft professional services

Reference Table

Ref.	Metric	Source	Value
R1	Annual revenue	Composite	\$7,000,000,000
R2	Percentage of employees in the revenue organization focusing on new business	Composite	15%
R3	Percentage of employees in the revenue organization focusing on growth (cross-sell)	Composite	40%
R4	Percentage of employees in the revenue organization focusing on growth (upsell)	Composite	30%
R5	Percentage of employees in the revenue organization focusing on retention	Composite	10%
R6	Percentage of employees in the revenue organization focusing on management and operations	Composite	5%
R7	Average annual deal value (new business)	Composite	\$50,000
R8	Average annual deal value (cross-sell)	Composite	\$30,000
R9	Average annual deal value (upsell)	Composite	\$10,000

Analysis Of Benefits

Quantified benefit data as applied to the composite

Total Benefits						
Ref.	Benefit	Year 1	Year 2	Year 3	Total	Present Value
Atr	Increased operating profit from improved sales effectiveness	\$3,511,961	\$5,239,987	\$6,480,101	\$15,232,049	\$12,391,855
Btr	Increased operating profit from increased selling activity	\$3,013,882	\$4,607,225	\$5,832,090	\$13,453,198	\$10,929,253
Ctr	Increased operating profit from improved opportunity management	\$1,138,465	\$1,839,840	\$2,449,732	\$5,428,037	\$4,396,017
Dtr	Increased operating profit from improved customer loyalty	\$620,057	\$958,038	\$1,219,784	\$2,797,879	\$2,271,897
Etr	Team productivity and performance	\$1,790,250	\$2,838,500	\$3,701,250	\$8,330,001	\$6,754,172
Ftr	Technology optimization	\$382,500	\$541,875	\$637,500	\$1,561,875	\$1,274,521
	Total benefits (risk-adjusted)	\$10,457,115	\$16,025,465	\$20,320,458	\$46,803,038	\$38,017,715

INCREASED OPERATING PROFIT FROM IMPROVED SALES EFFECTIVENESS

Evidence and data. Interviewees told Forrester that their organizations’ salespeople became more effective in their sales interactions. Salesloft’s capabilities, including sales engagement, agentic workflows, conversational intelligence, and coaching, helped their organizations’ sellers more effectively engage buyers with deeper and more timely insights. Interviewees explained that they could solicit increased responses to their engagement and convert those responses into opportunities at a greater rate.

- The head of sales optimization for an information services organization said: “We were converting 16% of our orders into progressed opportunities. Our sales development representatives are booking those calls and progressing those opportunities. The most recent full month is at 35%. We’ve converted almost twice as many orders into live opportunities.”

ANALYSIS OF BENEFITS

- The director, global head of prospecting for a financial services organization highlighted how Salesloft helped their organization produce quality pipeline. They said: “We have insights [with Salesloft]. Those insights also help us to tailor our messaging. Furthermore, the fact that it’s integrated with our other internal CRM tools helps us track activities [including] calls [and] emails. That is tremendously important.” This interviewee also explained how Salesloft helped improved their organization’s sales effectiveness, saying: “[Agentic workflows] help us prioritize the activities that prospectors need to take [and then action on them]. The different analytical reports that Salesloft has in its dashboard also helps us coach our team.” They added: “Does Salesloft help us get to customers quicker and in a more efficient and streamlined way? Yes. The first step of closing a deal, which is to get in touch with the prospect and have them agree to [talk to] us, is very much streamlined because of Salesloft.”
- The senior revenue operations manager for a commerce organization said: “[We achieved] an increase in the response rate [and] an increase in meetings booked. We were able to increase speed to lead and the consistency of the steps after that as far as prospect engagement by running automated enrollment and then automated messaging. [This made us] more consistent and therefore increased our outcomes.”
- The sales director for an electronics distribution organization said: “The response rate has increased ... 5 to 7 [percentage points].” They also explained how this benefit was realized throughout the buyer lifecycle, saying: “Yes, we have [seen improved customer growth], especially upsell and cross-sell. We use Salesloft for call blitzes and that’s our cross-sell. We get quite good lift out of that.” The interviewee concluded: “I’ve done about \$50 million in net new revenue. Eighty percent of that came from Salesloft.”
- Interviewees also told Forrester that Salesloft services helped their organizations realize value quicker and improved their performance over time. The director, global head of prospecting for a financial services organization said: “The Salesloft team is very proactive. [They help] ensure that we continue to not only see the same value that we’ve been seeing from Salesloft but also figure out how to use more features of the product to improve the value that we generate.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

ANALYSIS OF BENEFITS

- The composite organization benefits from increased sales effectiveness throughout the buyer lifecycle with Salesloft.
- It has 1,500 revenue organization employees with the following focus areas: new business (15%), cross-sell (40%), upsell (30%), retention (10%), and management and operations (5%). Eighty-five percent of employees who are focused on new business and growth benefit from the improved sales effectiveness.
- The average employee conducts 20 sales activities (e.g., emails or calls) per day, which equates to 5,000 sales activities per year.
- The composite organization progressively adopts Salesloft across the revenue organization over three years, reaching 100% of employees in Year 3. It benefits from a 20% faster user adoption rate due to Salesloft services.
- The composite organization's response rate without Salesloft is 5% and its conversion to opportunity rate without Salesloft is 10%.
- The composite organization improves its response rate with Salesloft by 18% in Year 1. This improvement increases 5% year over year and reaches 20% in Year 3 due to the impact of Salesloft's ongoing services.
- The composite organization improves its conversion to opportunity rate by 46% in Year 1 with Salesloft. This improvement increases 5% year over year and reaches 50% in Year 3 due to the impact of Salesloft's ongoing services.
- The composite organization's average blended annual deal value is based on the percentage of revenue organization from employees focusing on new business, cross-sell, and upsell, and the average annual deal values for each of these components. The composite organization's average annual deal values are \$50,000 for new business, \$30,000 for cross-sell, and \$10,000 for upsell.
- The closed/won rate without Salesloft is 10%.
- The operating profit margin is 12%.

Risks. This benefit may vary based on:

- The size of an organization, including the number of employees in its revenue organization and how they focus their time.

ANALYSIS OF BENEFITS

- The prior state of an organization, including its prior response rate, conversion to opportunity rate, and closed/won rate, as well as the average employee's sales activity without Salesloft.
- An organization's Salesloft adoption pace, change management capabilities, use of Salesloft services, and the corresponding degree of improvement realized as compared to its prior state.
- An organization's operating profit margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$12.4 million.

20%

Response rate improvement with Salesloft (Year 3)

50%

Conversion to opportunity rate improvement with Salesloft (Year 3)

ANALYSIS OF BENEFITS

Increased Operating Profit From Improved Sales Effectiveness					
Ref.	Metric	Source	Year 1	Year 2	Year 3
A1	People in revenue organization	Composite	1,500	1,500	1,500
A2	Percentage of employees selling	Composite	85%	85%	85%
A3	Selling activities per person per year without Salesloft	Composite	5,000	5,000	5,000
A4	Subtotal: Selling activities without Salesloft	A1*A2*A3	6,375,000	6,375,000	6,375,000
A5	Salesloft user adoption rate	Composite	60%	85%	100%
A6	Subtotal: Preexisting selling activities optimized with Salesloft	A4*A5	3,825,000	5,418,750	6,375,000
A7	Response rate without Salesloft	Composite	5%	5%	5%
A8	Conversion to opportunity rate without Salesloft	Composite	10%	10%	10%
A9	Improvement to response rate with Salesloft	Interviews	18%	19%	20%
A10	Improvement to conversion to opportunity rate with Salesloft	Interviews	46%	48%	50%
A11	Response rate with Salesloft	$A7*(1+A9)$	5.9%	5.95%	6%
A12	Conversion to opportunity rate with Salesloft	$A8*(1+A10)$	14.6%	14.8%	15%
A13	Average blended annual deal value	$((R2/A2)*R7) + ((R3/A2)*R8) + ((R4/A2)*R9)$	\$26,471	\$26,471	\$26,471
A14	Subtotal: Incremental new opportunities with Salesloft	(A6*A11*A12)-(A6*A7*A8)	13,824	20,624	25,500
A15	Subtotal: Incremental new pipeline with Salesloft	A13*A14	\$365,935,104	\$545,937,904	\$675,010,500
A16	Closed/won rate without Salesloft	Composite	10%	10%	10%
A17	Subtotal: Incremental closed/won deals with Salesloft	A14*A16	1,382	2,062	2,550
A18	Subtotal: Incremental revenue earned with Salesloft	A17*A13	\$36,582,922	\$54,583,202	\$67,501,050
A19	Operating profit margin	Composite	12%	12%	12%
At	Increased operating profit from improved sales effectiveness	$A18*A19$	\$4,389,951	\$6,549,984	\$8,100,126
	Risk adjustment	↓20%			
Atr	Increased operating profit from improved sales effectiveness (risk-adjusted)		\$3,511,961	\$5,239,987	\$6,480,101
Three-year total: \$15,232,049			Three-year present value: \$12,391,855		

INCREASED OPERATING PROFIT FROM INCREASED SELLING ACTIVITY

Evidence and data. Interviewees told Forrester their organizations could efficiently increase their sales activity throughout the buyer lifecycle while maintaining the same number of salespeople with Salesloft. Salesloft’s sales engagement and AI workflow capabilities helped their organizations drive optimal seller actions and build agentic-powered engagement sequences. These features led to maximized market opportunities through targeted engagement, which increased pipeline, deals, revenue, and operating profit.

- The head of sales optimization for an information services organization said: “There’s more activity. ... People that are heavily embedded with Salesloft are getting ... more leads and therefore they get more opportunities. It’s significant. We get a 50% uplift.” They explained: “Salesloft is folding down the amount of time we spend on any given lead because of Cadence.”

This interviewee also noted increased speed to opportunity and said: “Our entire inbound channel and our outbound campaigns all run through the Salesloft platform. We’re seeing that decrease the time to respond to a client. [Before Salesloft] we saw half-day response times on inbound queries. Now, [with Salesloft], we’re seeing 10- to 15-minute response times on inbound queries. That’s significant.”

- When asked whether Salesloft helped their financial services organization create more opportunities and increase pipeline value, the director, global head of prospecting for a financial services organization said, “Yes. The automated cadences of Salesloft have enabled reach at scale. My team will have, at any given point, 10,000 or more people on a cadence. [Manually doing this] over the course of 20 days would be very difficult. The fact that it is all automated helps us tremendously.” This interviewee summarized the increased seller productivity impact, saying: “Has prospecting activity increased per prospector? Yes. We’ve increased [engagement] activity 40% to 45% per prospector.”

However, the increased activity was not solely for new business, as the director, global head of prospecting explained: “Yes, Salesloft does help us [with upselling and cross-selling] because we’ve started using a feature on Salesloft called team cadences. ... It would be a lot more difficult and not as efficient because there’s no other tool or feature that we could use where I could send an email on someone else’s behalf.”

ANALYSIS OF BENEFITS

- The senior revenue operations manager for a commerce organization explained how their organization realized increased sales activity with Salesloft. They said: “We have implemented automation rules creation and scheduled imports that have resulted in an increase in meetings booked and opportunities created. ... We’ve increased pipeline value with Salesloft. ... [We’ve seen] Salesloft directly impact on our bottom line.”

This interviewee also noted the full buyer lifecycle impact, saying: “So, for our upsell team, we’ve just recently put in place an automation to take advantage of trials and autoenroll those into cadences. In the last 30 days, I’ve seen a 4% to 5% increase in opportunities created. We were at 4% and now we’re at about 8% to 8.6% opportunities created from that automation and cadence.”

- The sales director for an electronics distribution organization said: “[There has] been an uplift [in pipeline value]. ... Between last year and this year, our activity is up 30% by utilizing Salesloft more and more effectively.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Without Salesloft, the composite organization averages 5,000 selling activities (e.g., a call, email, or other similar activity) per employee per year, or approximately 20 selling activities per day.
- The composite organization increases its selling activity with Salesloft 36% in Year 1. This improvement increases 5% year over year and reaches 40% in Year 3 due to Salesloft’s ongoing services. As a result, the composite generates more opportunities, pipeline, deals, revenue, and operating profit.
- The composite organization’s operating profit margin is 12%.

Risks. This benefit may vary based on:

- This size of an organization and the number of salespeople.
- The time spent targeting new business.
- The prior state of an organization, the nature of its business, the number of sales activities per person per year, and the opportunity for improvement.

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- The change management capabilities of an organization, its use of Salesloft services and Salesloft, and the corresponding degree of improvement realized.
- An organization's operating profit margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$10.9 million.

40%

Increase in selling activities with Salesloft (Year 3)

“[Salesloft] helps us produce more, [higher-quality] pipeline because we're better informed, and it helps us do it faster and in a more automated way.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

ANALYSIS OF BENEFITS

Increased Operating Profit From Increased Selling Activity					
Ref.	Metric	Source	Year 1	Year 2	Year 3
B1	Selling activities without Salesloft	A4	6,375,000	6,375,000	6,375,000
B2	Salesloft user adoption rate	A5	60%	85%	100%
B3	Percentage increase in selling activities with Salesloft	Interviews	36%	38%	40%
B4	Subtotal: Incremental new selling activities with Salesloft	B1*B2*B3	1,377,000	2,059,125	2,550,000
B5	Response rate with Salesloft	A11	5.9%	5.95%	6%
B6	Conversion to opportunity rate with Salesloft	A12	14.6%	14.8%	15%
B7	Subtotal: Incremental new opportunities with Salesloft	B4*B5*B6	11,861	18,133	22,950
B8	Subtotal: Incremental new pipeline generated with Salesloft	B7*A13	\$313,972,531	\$479,998,643	\$607,509,450
B9	Closed/won rate without Salesloft	A16	10%	10%	10%
B10	Subtotal: Incremental closed/won deals with Salesloft	B7*B9	1,186	1,813	2,295
B11	Subtotal: Incremental revenue earned with Salesloft	B10*A13	\$31,394,606	\$47,991,923	\$60,750,945
B12	Operating profit margin	A19	12%	12%	12%
Bt	Increased operating profit from increased selling activity	B11*B12	\$3,767,353	\$5,759,031	\$7,290,113
	Risk adjustment	↓20%			
Btr	Increased operating profit from increased selling activity (risk-adjusted)		\$3,013,882	\$4,607,225	\$5,832,090
Three-year total: \$13,453,198			Three-year present value: \$10,929,253		

INCREASED OPERATING PROFIT FROM IMPROVED OPPORTUNITY MANAGEMENT

Evidence and data. Beyond increased sales effectiveness and sales activity driving more pipeline, interviewees told Forrester that their organizations were also able to win a greater percentage of opportunities. They explained that Salesloft enabled them to engage contacts quickly and consistently, prioritize opportunities effectively, and improve performance with coaching and insights, leading to faster deal velocity and an increased closed/won rate.

- The head of sales optimization for an information services organization said, “We’re seeing the win rate go up.” They added: “Time to progress a sale [has improved]. The number of persistent contacts that reps would make would be very variable before. Now,

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it's consistent." The interviewee also noted: "Deal velocity is key. We're starting to cut it down. If we cut a day off our response to a customer, clearly it improves conversion."

- The senior revenue operations manager for a commerce organization said: "[Salesloft conversation intelligence] is great. Having those insights is helpful. With the adoption of [their opportunity management tool], we'll also be able to see more impact on [closed/won rates] on the coaching level."

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- It manages all opportunities with Salesloft, including incremental new opportunities generated by improved sales effectiveness and increased selling activity. This activity scales year over year as a greater percentage of employees in the revenue organization adopt Salesloft.
- The closed/won rate without Salesloft is 10%.
- The composite organization increases its closed/won rate by 10% with Salesloft in Year 1. This improvement increases 5% year over year and reaches 12% in Year 3 due to Salesloft's ongoing services. As a result, the composite converts additional incremental opportunities into closed/won deals, thereby increasing revenue and operating profit.
- The composite's operating profit margin is 12%.

Risks. This benefit may vary based on:

- The number of opportunities and the value of the pipeline an organization manages with Salesloft as influenced by an organization's size, sales activity, and Salesloft adoption.
- The prior state of an organization including its previous closed/won rate, potential for improvement, change management capabilities, use of Salesloft services and Salesloft, and the corresponding degree of improvement realized.
- An organization's operating profit margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$4.4 million.

12%

Closed/won rate improvement with Salesloft (Year 3)

“Would our [closed/won deal rate] be the same without Salesloft? No. It would be significantly lower.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

Increased Operating Profit From Improved Opportunity Management

Ref.	Metric	Source	Year 1	Year 2	Year 3
C1	Subtotal: Cumulative opportunities managed with Salesloft	(A6+B4)*A11* A12	44,810	65,850	80,325
C2	Subtotal: Cumulative pipeline managed with Salesloft	C1*A13	\$1,186,165,510	\$1,743,115,350	\$2,126,283,075
C3	Closed/won rate without Salesloft	A16	10%	10%	10%
C4	Percentage improvement to closed/won rate with Salesloft	Interviews	10%	11%	12%
C5	Closed/won rate with Salesloft	C3*(1+C4)	11%	11.1%	11.2%
C6	Subtotal: Incremental closed/won deals with Salesloft	(C1*C5)-(C1*C3)	448	724	964
C7	Subtotal: Incremental revenue earned with Salesloft	C6*A13	\$11,859,008	\$19,165,004	\$25,518,044
C8	Operating profit margin	A19	12%	12%	12%
Ct	Increased operating profit from improved opportunity management	C7*C8	\$1,423,081	\$2,299,800	\$3,062,165
	Risk adjustment	↓20%			
Ctr	Increased operating profit from improved opportunity management (risk-adjusted)		\$1,138,465	\$1,839,840	\$2,449,732
Three-year total: \$5,428,037			Three-year present value: \$4,396,017		

INCREASED OPERATING PROFIT FROM IMPROVED CUSTOMER LOYALTY

Evidence and data. Interviewees explained that Salesloft positively impacted the entire buyer lifecycle from new business sales to growth to retention. They told Forrester that their organizations could better engage with current customers and manage deals with greater insight into the most valuable customer information, thereby driving increased renewals, incremental revenue, and operating profit.

- The head of sales optimization for an information services organization explained that Salesloft helped their organization increase customer engagement, which led to an increased retention rate. They told Forrester: “Salesloft has allowed us to work toward having every client contacted every quarter. In contrast to 20% to 30% of customers being contacted within the last 90 days, we’re now [engaging] more than 50% of customers and will get to 70% to 80% of customers in the next two or three months.” As a result of this increase, they stated: “In some cases, we’re engaging with customers four to five times as much as we did before. That is a leading measure for retention. Our retention rates are running from 80% to 83%. We forecast a 3- to 4-percentage-point increase in how we retain customers, which is sizable.”
- The senior revenue operations manager for a commerce organization said: “Our customer success teams are getting more involved in the renewals of deals instead of just having the system run them. Salesloft will be integral for them to be able to spot risky deals as well as put in place actual cadences that will be specific to renewals.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- It has 140,000 customers as determined by its total revenue and average deal size.
- The composite organization’s average deal length is three years, resulting in an average of 33% being available for renewal each year.
- The renewal rate without Salesloft is 80%.
- The composite organization increases its renewal rate 1.1% with Salesloft in Year 1. This improvement increases 5% year over year and reaches 1.3% in Year 3 due to Salesloft’s ongoing services. This improvement results in more renewed deals each year.

Risks. This benefit may vary based on:

- An organization's number of customers and how many are eligible to renew their deals each year. Varying factors include deal length, deal size, and the nature of an organization's business.
- The prior state of an organization including its previous retention rate, potential for improvement, change management capabilities, use of Salesloft services and Salesloft, and the corresponding degree of improvement realized.
- An organization's operating profit margin.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$2.3 million.

1.3%

Renewal rate improvement with Salesloft (Year 3)

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Increased Operating Profit From Improved Customer Loyalty					
Ref.	Metric	Source	Year 1	Year 2	Year 3
D1	Customers	Composite	140,000	140,000	140,000
D2	Percentage of deals eligible for renewal	Composite	33%	33%	33%
D3	Subtotal: Deals eligible for renewal managed with Salesloft	D1*D2*A5	27,720	39,270	46,200
D4	Renewal rate without Salesloft	Composite	80%	80%	80%
D5	Percentage improvement to renewal rate with Salesloft	Interviews	1.1%	1.2%	1.3%
D6	Renewal rate with Salesloft	$D4*(1+D5)$	80.88%	80.96%	81.04%
D7	Subtotal: Incremental deals renewed with Salesloft	(D3*D6)-(D3*D4)	244	377	480
D8	Subtotal: Incremental revenue with Salesloft	D7*A13	\$6,458,924	\$9,979,567	\$12,706,080
D9	Operating profit margin	A19	12%	12%	12%
Dt	Increased operating profit from improved customer loyalty	$D8*D9$	\$775,071	\$1,197,548	\$1,524,730
	Risk adjustment	↓20%			
Dtr	Increased operating profit from improved customer loyalty (risk-adjusted)		\$620,057	\$958,038	\$1,219,784
Three-year total: \$2,797,879			Three-year present value: \$2,271,897		

TEAM PRODUCTIVITY AND PERFORMANCE

Evidence and data. In addition to Salesloft’s full buyer lifecycle revenue-related benefits, interviewees shared its team productivity benefits, which included effective and efficient coaching sessions, less manual work, and an improved focus on driving the right actions at the right time using insights. Interviewees said that Salesloft capabilities such as agentic workflows, coaching, conversational intelligence, and the embedded Conductor AI feature drove these benefits. The resulting time savings and ability to focus enabled further success and growth for the interviewees’ organizations.

- The senior revenue operations manager for a commerce organization highlighted the coaching productivity impact, saying: “We have asked our coaches, as part of a pilot, to score 50% of their team each week, so that’s about 7 hours per week. When you can scroll through [AI-generated] key moments in your conversations, [and more with Salesloft], that saves one-third of your time at least.” They continued: “I believe it has

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improved the employee experience. Pulling everything into one platform was our highest priority ... where we can make [it all] as actionable as possible.”

- Similarly, the head of sales optimization for an information services organization also highlighted the coaching and management productivity benefits for salespeople and managers, saying: “The organization the platform offers for an individual in a sales role is invaluable. [The increased visibility] reduces management time. The manager can take the information from their activity logged and the dashboards. It’s cutting down the time reporting and increasing the time to talk about what should be done differently.”

This interviewee then detailed: “Sales managers spent 10% of their time previously looking into what everyone is doing, having those discussions, and reporting back. It’s about one-third of that time [saved] in terms of not having to be debriefed on what’s happened because they can already access that information. ... [Salespeople] save that same time as well because they’re not having to report back to the manager on [their activities]. ... We’d be expecting them to put 5% of their time into the management conversations. That goes down to 3% or 4%.” They concluded: “The transcripts, the action items, and the AI-driven summaries of meetings are saving time and making it clearer for our clients. [Conversation intelligence] is one of the features we really use.”

- The director, global head of prospecting for a financial services organization highlighted the value of agentic workflows for productivity. They explained that AI helped automatically prioritize tasks in a workflow their organization’s sellers could action on and anticipated a 10% reduction in their administrative burden.
- The senior revenue operations manager for a commerce organization also spoke about the impact of AI with Salesloft, saying: “AI will allow us to continue to become more strategic. AI is automation, such as with automated sends and being able to pull together relevant messaging based on previous interactions within the platform and meeting follow-ups based on transcripts. It pulls relevant details and allows our sellers to become reviewers and approvers and to look at something with a lens of critique versus having to build from the ground-up, which is a time-saver. It allows them to be better at their roles.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

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- The employees in the revenue organization who focus on management and operations spend five hours per week preparing for coaching sessions.
- These team members improve their coaching productivity by 29% in Year 1. This increases 5% year over year and reaches 32% in Year 3 due to Salesloft's ongoing services.
- The composite organization's remaining employees spend 14 hours per week on nonselling activities.
- These team members improve their use of this time by up to 8% in Year 1. This increases 5% year over year and reaches 10% in Year 3 due to Salesloft's ongoing services.
- The average fully burdened salary of these team members is \$250,000.
- These team members recapture 35% of their time saved for productive work.

Risks. This benefit may vary based on:

- The size of an organization's revenue organization, degree of Salesloft use (including adoption pace), and organizational makeup.
- The prior state of an organization, potential for improvement, change management capabilities, use of Salesloft services and Salesloft, and the corresponding degree of improvement realized.
- Whether an organization can reallocate time savings to productive work.

Results. To account for these risks, Forrester adjusted this benefit downward by 20%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$6.8 million.

32%

Coaching productivity improvement with Salesloft (Year 3)

“Coaching time is improved and refined [with Salesloft] because we’ve already got a snapshot into what’s happening.”

HEAD OF SALES OPTIMIZATION, INFORMATION SERVICES

“[Salesloft] has been a very good business decision for us.”

SALES DIRECTOR, ELECTRONICS DISTRIBUTION

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Team Productivity And Performance					
Ref.	Metric	Source	Year 1	Year 2	Year 3
E1	People in revenue organization	A1	1,500	1,500	1,500
E2	Percentage of employees in the revenue organization managing employees	R6	5%	5%	5%
E3	Average hours spent preparing for coaching sessions per week	Composite	5	5	5
E4	Improved coaching productivity	Interviews	29%	30%	32%
E5	Subtotal: More productive coaching preparation hours per week	E1*E2*E3*E4* A5	65	96	120
E6	Percentage of employees in the revenue organization that are nonmanagement or operations	1-E2	95%	95%	95%
E7	Average hours spent on nonselling activities per week	Composite	14	14	14
E8	Improved productivity	Interviews	8%	9%	10%
E9	Subtotal: More productive administrative hours per week	E1*E6*E7*E8* A5	958	1,526	1,995
E10	Average fully burdened salary	Composite	\$250,000	\$250,000	\$250,000
E11	Productivity recapture rate	TEI standard	35%	35%	35%
Et	Team productivity and performance	$(E5+E9)*(E10/2,080 \text{ hours})*E11*52 \text{ weeks}$	\$2,237,813	\$3,548,125	\$4,626,563
	Risk adjustment	↓20%			
Etr	Team productivity and performance (risk-adjusted)		\$1,790,250	\$2,838,500	\$3,701,250
Three-year total: \$8,330,001			Three-year present value: \$6,754,172		

TECHNOLOGY OPTIMIZATION

Evidence and data. Depending on their prior state, interviewees told Forrester that their organizations could optimize technology spending. They discussed how choosing and adopting Salesloft allowed their organizations to retire select solutions, thereby achieving cost consolidation savings and associated productivity gains from managing fewer solutions. These cost savings were reallocated to drive better returns.

The senior revenue operations manager for a commerce organization shared an example of cost consolidation savings, saying: “We ended the contract a couple of months later. It was in the hundreds of thousands [of dollars].” They also explained how consolidating tools helped with

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workflow productivity, saying, “To focus on one tool allows me to context switch less, which makes me more productive.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Fifty percent of the composite organization’s revenue organization have one preexisting point solution.
- It incrementally retires preexisting point solutions as Salesloft adoption increases.
- The average point solution costs the composite organization \$1,000 per user per year.

Risks. This benefit may vary based on:

- The prior state of an organization, including whether its revenue organization has preexisting point solutions that it can retire after adopting Salesloft and the members of the revenue organization who use those solutions.
- Whether an organization chooses to retire any preexisting point solutions.
- The size of an organization’s revenue organization, Salesloft adoption pace, and which employees adopt Salesloft.
- Preexisting point solution costs and contract length.

Results. To account for these risks, Forrester adjusted this benefit downward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.3 million.

\$1.3 million

Technology optimization cost savings

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Technology Optimization					
Ref.	Metric	Source	Year 1	Year 2	Year 3
F1	People in revenue organization	A1	1,500	1,500	1,500
F2	Salesloft user adoption rate	A5	60%	85%	100%
F3	Percentage of people in revenue organization with preexisting point solutions	Composite	50%	50%	50%
F4	Point solutions retired	Composite	1	1	1
F5	Point solutions cost per user	Composite	\$1,000	\$1,000	\$1,000
Ft	Technology optimization	F1*F2*F3*F4*F5	\$450,000	\$637,500	\$750,000
	Risk adjustment	↓15%			
Ftr	Technology optimization (risk-adjusted)		\$382,500	\$541,875	\$637,500
Three-year total: \$1,561,875			Three-year present value: \$1,274,521		

UNQUANTIFIED BENEFITS

Interviewees mentioned the following additional benefits that their organizations experienced but were not able to quantify:

- Improved data quality.** Interviewees told Forrester that their organizations realized improved data quality using Salesloft’s integrations, CRM sync, AI, automations, and deal management capabilities. The senior revenue operations manager of a commerce organization explained, “We are seeing an impact on data hygiene because [our salespeople] are able to log information, which simply wasn’t feasible with time before.”
- Increased visibility and insights.** Related to improved data quality, interviewees told Forrester that their organizations benefited from increased revenue-related visibility and insights. With better insights, the interviewees’ organizations could analyze performance, monitor deal progression, identify opportunity gaps for improvement, take better actions, and drive revenue. The head of sales optimization for an information services organization said, “The features around call recording and conversational intelligence ... help us because we get visibility of how we’re selling to our B2B customers.” The director, global head of prospecting for a financial services organization said: “Other features that have unlocked value for us [include] analytics. It tremendously helps us

coach our team to have better responses. We download analytical reports and put them into our internal systems to see where we can improve as far as the wording or message is concerned to certain prospects and different industries.”

- **Salesloft support and education.** Interviewees highlighted the value of Salesloft support, documentation, and educational resources in addition to Salesloft services. They spoke highly of Salesloft-provided support and resources, noting how they enabled internal teams to spend less time on support tasks and more time on revenue-driving activities. For more detail on the interviewees’ experiences with Salesloft services, please reference the accompanying Spotlight.

10%

Quicker value realization with Salesloft services

“Salesloft services are invaluable. They prioritize getting deep and wide context within your organization quickly and ensure that they understand the nuances.”

SENIOR REVENUE OPERATIONS MANAGER, COMMERCE

FLEXIBILITY

The value of flexibility is unique to each customer. There are multiple scenarios in which a customer might implement Salesloft and later realize additional uses and business opportunities, including:

- **Enterprise-readiness and scalability.** The interviewees' organizations are all large enterprises with complex organizational structures, large and distributed global sales teams, a history of acquisitions, public company governance requirements, and more. The interviewees highlighted the scalability and strength of Salesloft in an enterprise environment. The head of sales optimization for an information services organization said: "We had to land it with the first team, prove the value, and then widen it out. [Salesloft] is scalable." The director, global head of prospecting for a financial services organization said, "We're able to utilize Salesloft more and it can take that load." The senior revenue operations manager for a commerce organization said: "Yes, Salesloft is enterprise-ready. They have the support team necessary to focus and understand what a high-touch account requires, and the platform is continuously evolving." The sales director for an electronics distribution organization said: "There are other business units [within our organization] that Salesloft is growing to. We're using it in EMEA now." They added: "We're publicly traded. We can rest assured that what we're doing is fair and equitable to all salespeople." This interviewee concluded, "[It is] enterprise-ready because it ties directly into [our CRM] and there are other [integrations]."

"Without Salesloft, we wouldn't be able to scale and get the growth that we have."

SALES DIRECTOR, ELECTRONICS DISTRIBUTION

- **Use with other technology.** Interviewees highlighted the value of Salesloft's interoperability and integration with other technologies, which drove their increased use and ROI. The senior revenue operations manager for a commerce organization said: "We're looking at the integration with [a sales solution and our CRM]. Salesloft has helped with our activity logging as well as giving reps some understanding of [how their buyers are behaving], especially if they're not leaving the Salesloft platform." The sales director for an electronics distribution organization said: "We've bought other complementary solutions and are in the process of evaluating more complementary solutions that tie into Salesloft. It's helping us accelerate even further."
- **Platform growth, including Drift.** Three out of the four interviewees' organizations were Drift customers before Salesloft acquired the company in 2024. At the time, Forrester wrote that the acquisition was, "a positive step for buyers looking for more aligned technology for their revenue teams."⁵ Similarly, the interviewees told Forrester that they were excited about the prospect of increased integration and value. The head of sales optimization for an information services organization said: "[Using Drift and Salesloft together] absolutely improved the engagement and more. ... We've been really pleased [with Salesloft's Drift acquisition]."

Flexibility would also be quantified when evaluated as part of a specific project (described in more detail in [Appendix A](#)).

"Is Salesloft scalable? Absolutely. Is it enterprise-ready? Absolutely."

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

Analysis Of Costs

Quantified cost data as applied to the composite

Total Costs							
Ref.	Cost	Initial	Year 1	Year 2	Year 3	Total	Present Value
Gtr	Salesloft	\$302,500	\$2,603,810	\$3,612,290	\$4,217,510	\$10,736,110	\$8,823,641
Htr	Implementation	\$191,667	\$0	\$0	\$0	\$191,667	\$191,667
Itr	Training	\$0	\$372,600	\$527,850	\$621,000	\$1,521,450	\$1,241,533
Jtr	Ongoing management and support	\$0	\$287,500	\$287,500	\$287,500	\$862,500	\$714,970
Ktr	Sales enablement	\$0	\$143,750	\$143,750	\$143,750	\$431,250	\$357,485
	Total costs (risk-adjusted)	\$494,167	\$3,407,660	\$4,571,390	\$5,269,760	\$13,742,977	\$11,329,296

SALESLOFT

Evidence and data. Interviewees told Forrester that their organizations paid for Salesloft on a per user per month basis with pricing varying between the Advanced and Premier packages and costs for admin and dialer users. Additionally, all four interviewees' organizations took advantage of Salesloft services including onboarding, project-based engagements, and recurring programs to accelerate and maximize the value they received. Pricing may vary. Contact Salesloft for additional details.

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization selects the Advanced package and pays a monthly cost for each member of its revenue organization. It then pays an additional cost per month for each admin and dialer user.
- The composite organization purchases onboarding services and a project-based engagement from Salesloft to help with the implementation. It also purchases a recurring consulting program to drive improved performance.

Risks. This cost may vary based on:

- An organization's size, revenue organization scale, Salesloft adoption pace, and the number of users who need licenses.
- The structure and nature of an organization's revenue organization and the resulting percentage of Salesloft users that need admin and dialer licenses.
- The Salesloft services an organization chooses to purchase.
- Salesloft's licensing and services pricing.

Results. To account for these risks, Forrester adjusted this cost upward by 10%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$8.8 million.

5%

Greater value realization with Salesloft services

“Compared to any other similar technology, Salesloft is very cost competitive.”

SALES DIRECTOR, ELECTRONICS DISTRIBUTION

“The Salesloft services team was wonderful. [They were a] really great help. ... Services from Salesloft helped accelerate adoption.”

SENIOR REVENUE OPERATIONS MANAGER, COMMERCE

Salesloft						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
G1	Salesloft	Composite	\$275,000	\$2,367,100	\$3,283,900	\$3,834,100
Gt	Salesloft	G1	\$275,000	\$2,367,100	\$3,283,900	\$3,834,100
	Risk adjustment	↑10%				
Gtr	Salesloft (risk-adjusted)		\$302,500	\$2,603,810	\$3,612,290	\$4,217,510
Three-year total: \$10,736,110			Three-year present value: \$8,823,641			

IMPLEMENTATION

Evidence and data. After choosing to invest in Salesloft, interviewees detailed how their organizations implemented the revenue orchestration platform including planning, configuration, enablement, and deployment. They also shared how Salesloft’s services team assisted with and accelerated this process, allowing their organizations to realize value more quickly.

- The senior revenue operations manager for a commerce organization explained: “We made a four- to five-month timeline. We pushed and said we wanted to do it in three.” They summarized: “[Implementation took] about half of my time and half of a project manager’s time. Our process team [of ten] on the revenue operations side was involved as well ... [with approximately] 10% to 15% [of their time].”
- The sales director for an electronics distribution organization said: “Our operations team had to be involved. We had to test and make sure that there would be no interruptions and that everything would work seamlessly together.” When asked if they believed whether Salesloft services allowed their organization to achieve greater success than they could have on their own, they responded, “Absolutely. ... It was seamless.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization takes advantage of Salesloft services to accelerate implementation and adoption and avoid additional internal labor.
- The implementation takes four months.

ANALYSIS OF COSTS

- Two internal employees manage the implementation.
- These employees dedicate 100% of their time to implementation during this period.
- The average fully burdened salary of an employee dedicated to implementation is \$250,000.

Risks. This cost may vary based on:

- Whether an organization takes advantage of Salesloft services, which can shorten the implementation timeline and reduce required internal labor.
- The prior state of an organization's environment, the capabilities of its staff, and the corresponding length of an organization's implementation period.
- The number of employees an organization requires to implement Salesloft, which may vary by their expertise, roles, and responsibilities.
- The fully burdened salaries of these participating employees.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$192,000.

30%

Accelerated onboarding with Salesloft services

“It was a very simple adoption.”

SALES DIRECTOR, ELECTRONICS DISTRIBUTION

ANALYSIS OF COSTS

Implementation						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
H1	Implementation time (months)	Interviews	4			
H2	Internal employees managing the implementation process	Composite	2			
H3	Percentage of time dedicated to implementation	Interviews	100%			
H4	Average fully burdened salary for an employee dedicated to implementation	Composite	\$250,000			
Ht	Implementation	(H1/12 months)*H2*H3*H4	\$166,667	\$0	\$0	\$0
	Risk adjustment	↑15%				
Htr	Implementation (risk-adjusted)		\$191,667	\$0	\$0	\$0
Three-year total: \$191,667			Three-year present value: \$191,667			

TRAINING

Evidence and data. Interviewees told Forrester that their organizations worked with Salesloft to train their employees as part of the adoption process. This training and enablement continued annually to onboard new employees and refresh existing employees. Critically, the interviewees emphasized the importance of not only learning how to use Salesloft, but how to use Salesloft effectively within their unique organizations and environments. To accomplish this and accelerate adoption, they emphasized the value of Salesloft services, not only to lead trainings but also to create bespoke trainings.

- The head of sales optimization for an information services organization said: “We have two, one-hour sessions [for new employees]. One is an introduction, and one is role-specific. We then have a 15-minute prerecorded bespoke video that has been done by the Salesloft services team and a guide that was provided by the Salesloft services team as well. We effectively have three hours of prescribed training upon a new start ... plus some on-the-job training.”
- The director, global head of prospecting for a financial services organization said: “Every time I get a new hire, they’re trained on Salesloft. ... We don’t spend more than four to five hours training an employee how to use Salesloft.”
- The senior revenue operations manager for a commerce organization said, “We had live training sessions [at launch].” They continued, “Onboarding was two sessions and some

asynchronous learning courses as well. Now, they have an hour of [training] and then they take two Salesloft courses to get up to speed.”

- The sales director for an electronics distribution organization said: “We do refreshers for existing staff and when we have turnover. ... The Salesloft services team does ongoing sessions with us.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- Each new Salesloft user receives an initial training and refresher training in subsequent years.
- Training requires an average of three hours per user per year.
- The fully burdened hourly rate of users receiving training is \$120.

Risks. This cost may vary based on:

- The size of an organization, its degree and pace of adopting Salesloft, and the resulting number of Salesloft users each year.
- An organization’s training decisions, including how much training each user receives and how often.
- The fully burdened hourly rates of users receiving the training, the users’ degree of experience, and how much training they require.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$1.2 million.

“[Salesloft] is an easy tool to learn. It’s a matter of how you make the best of it and use it to the best of its abilities.”

DIRECTOR, GLOBAL HEAD OF PROSPECTING, FINANCIAL SERVICES

“It’s not a heavy lift to onboard. [Salesloft] is an intuitive, simple platform.”

SALES DIRECTOR, ELECTRONICS DISTRIBUTION

Training						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
I1	New users trained	$(A1_{CY} * A5_{CY}) - (A1_{PY} * A5_{PY})$	0	900	375	225
I2	Existing users refreshed	$I1_{PY} + I2_{PY}$	0	0	900	1,275
I3	Average hours of training per user	Interviews	3	3	3	3
I4	Average fully burdened hourly rate for a user receiving training	Composite	\$120	\$120	\$120	\$120
It	Training	$(I1 + I2) * I3 * I4$	\$0	\$324,000	\$459,000	\$540,000
	Risk adjustment	↑15%				
Itr	Training (risk-adjusted)		\$0	\$372,600	\$527,850	\$621,000
Three-year total: \$1,521,450			Three-year present value: \$1,241,533			

ONGOING MANAGEMENT AND SUPPORT

Evidence and data. After their organizations implemented Salesloft, conducted initial employee training, and began paying for the platform, interviewees explained how their organizations invested necessary labor for ongoing management and support. This labor included Salesloft IT management, administration, vendor management, and other operational support to sustain continued use and realize value over time.

- The director, global head of prospecting for a financial services organization said: “[Ongoing management and support involves] the sales operation and vendor management teams. That is five to six people, and it’s not anyone’s full-time job. ... It is 5% to 10% of their overall work to maintain Salesloft.”

ANALYSIS OF COSTS

- The senior revenue operations manager for a commerce organization said: “I am one person dedicated to Salesloft, and we’ve recently onboarded another person dedicated to Salesloft. Our team lead is decently involved as well, ... [and that takes] 20% of their time. We have two support people that do help us with users, [and that takes] 10% to 20% of their time as well.”

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization has four people involved in ongoing management and support.
- The average fully burdened salary for a revenue organization role is \$250,000.
- These roles dedicate 25% of their time to ongoing management and support.

Risks. This cost may vary based on:

- The size of an organization and the degree of its Salesloft adoption and usage.
- The average fully burdened salaries of the individuals involved in this labor.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$715,000.

Ongoing Management And Support						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
J1	People involved in ongoing management and support	Composite	0	4	4	4
J2	Average fully burdened salary for an individual involved in ongoing management and support	Composite	\$250,000	\$250,000	\$250,000	\$250,000
J3	Percentage of time dedicated to ongoing management and support	Interviews	25%	25%	25%	25%
Jt	Ongoing management and support	J1*J2*J3	\$0	\$250,000	\$250,000	\$250,000
	Risk adjustment	↑15%				
Jtr	Ongoing management and support (risk-adjusted)		\$0	\$287,500	\$287,500	\$287,500
Three-year total: \$862,500			Three-year present value: \$714,970			

SALES ENABLEMENT

Evidence and data. Interviewees' organizations invested in sales enablement to systematically support the increased, Salesloft-driven sales activity and improve its ROI. This labor investment included ongoing content creation, engagement sequence development, and internal or outsourced template creation.

- The head of sales optimization for an information services organization explained: "We use a central function for sales enablement. We have one person dedicated to this group, and 20% of their time is Salesloft-specific."
- As opposed to using a central function for content creation, the sales director for an electronics distribution organization explained that it outsourced some of this labor, saying: "We have outside sources create content that we load in. It's very quick and simple."
- The director, global head of prospecting for a financial services organization detailed how each person on their team played a role, saying, "Everybody who uses Salesloft on my team creates their own cadence because it's so straightforward."

Modeling and assumptions. Based on the interviews, Forrester assumes the following about the composite organization:

- The composite organization has two people involved in Salesloft-related sales enablement.
- The average fully burdened salary for a revenue organization role is \$250,000.
- These roles dedicate 25% of their time to Salesloft-related sales enablement.

Risks. This cost may vary based on:

- An organization's ongoing sales enablement needs as influenced by the size of an organization, the degree of its Salesloft adoption and use, the growth it realizes with Salesloft, and the importance it places on sales enablement.
- The average fully burdened salaries of the individuals involved in this labor.

Results. To account for these risks, Forrester adjusted this cost upward by 15%, yielding a three-year, risk-adjusted total PV (discounted at 10%) of \$357,000.

Process Definition

Sales Enablement

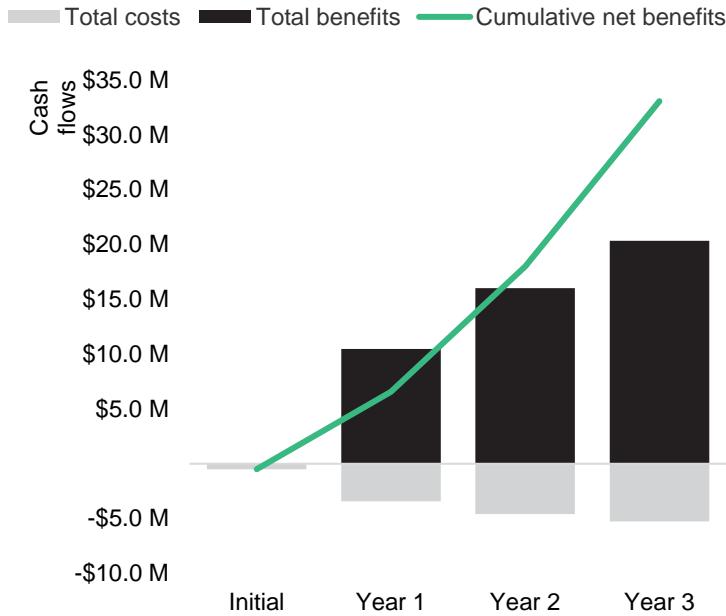
Forrester defines **sales enablement** as “a strategic, ongoing process that equips all client-facing employees with the ability to consistently and systematically have a valuable conversation with the right set of customer stakeholders at each stage of the customer’s problem-solving lifecycle to optimize the return on investment of the selling system.”⁶

Sales Enablement						
Ref.	Metric	Source	Initial	Year 1	Year 2	Year 3
K1	People involved in ongoing content creation, cadence development, and template creation	Composite	0	2	2	2
K2	Average fully burdened salary	Composite	\$250,000	\$250,000	\$250,000	\$250,000
K3	Percentage of time dedicated to content creation, cadence development, and template creation	Interviews	25%	25%	25%	25%
Kt	Sales enablement	$K1 * K2 * K3$	\$0	\$125,000	\$125,000	\$125,000
	Risk adjustment	↑15%				
Ktr	Sales enablement (risk-adjusted)		\$0	\$143,750	\$143,750	\$143,750
Three-year total: \$431,250			Three-year present value: \$357,485			

Financial Summary

Consolidated Three-Year, Risk-Adjusted Metrics

Cash Flow Chart (Risk-Adjusted)



The financial results calculated in the Benefits and Costs sections can be used to determine the ROI, NPV, and payback period for the composite organization's investment. Forrester assumes a yearly discount rate of 10% for this analysis.

These risk-adjusted ROI, NPV, and payback period values are determined by applying risk-adjustment factors to the unadjusted results in each Benefit and Cost section.

Cash Flow Analysis (Risk-Adjusted)

	Initial	Year 1	Year 2	Year 3	Total	Present Value
Total costs	(\$494,167)	(\$3,407,660)	(\$4,571,390)	(\$5,269,760)	(\$13,742,977)	(\$11,329,296)
Total benefits	\$0	\$10,457,115	\$16,025,465	\$20,320,458	\$46,803,038	\$38,017,715
Net benefits	(\$494,167)	\$7,049,455	\$11,454,075	\$15,050,698	\$33,060,062	\$26,688,419
ROI						236%

APPENDIX A: TOTAL ECONOMIC IMPACT

Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

Total Economic Impact Approach

Benefits represent the value the solution delivers to the business. The TEI methodology places equal weight on the measure of benefits and costs, allowing for a full examination of the solution's effect on the entire organization.

Costs comprise all expenses necessary to deliver the proposed value, or benefits, of the solution. The methodology captures implementation and ongoing costs associated with the solution.

Flexibility represents the strategic value that can be obtained for some future additional investment building on top of the initial investment already made. The ability to capture that benefit has a PV that can be estimated.

Risks measure the uncertainty of benefit and cost estimates given: 1) the likelihood that estimates will meet original projections and 2) the likelihood that estimates will be tracked over time. TEI risk factors are based on "triangular distribution."

PRESENT VALUE (PV)

The present or current value of (discounted) cost and benefit estimates given at an interest rate (the discount rate). The PV of costs and benefits feed into the total NPV of cash flows.

NET PRESENT VALUE (NPV)

The present or current value of (discounted) future net cash flows given an interest rate (the discount rate). A positive project NPV normally indicates that the investment should be made unless other projects have higher NPVs.

RETURN ON INVESTMENT (ROI)

A project's expected return in percentage terms. ROI is calculated by dividing net benefits (benefits less costs) by costs.

DISCOUNT RATE

The interest rate used in cash flow analysis to take into account the time value of money. Organizations typically use discount rates between 8% and 16%.

PAYBACK PERIOD

The breakeven point for an investment. This is the point in time at which net benefits (benefits minus costs) equal initial investment or cost.

The initial investment column contains costs incurred at “time 0” or at the beginning of Year 1 that are not discounted. All other cash flows are discounted using the discount rate at the end of the year. PV calculations are calculated for each total cost and benefit estimate. NPV calculations in the summary tables are the sum of the initial investment and the discounted cash flows in each year. Sums and present value calculations of the Total Benefits, Total Costs, and Cash Flow tables may not exactly add up, as some rounding may occur.

APPENDIX B: SUPPLEMENTAL MATERIAL

Related Forrester Research

[Predictions 2025: B2B Marketing, Sales, And Product](#), Forrester Research, Inc., October 22, 2024.

Anthony McPartlin and Seth Marris, [The First Forrester Wave™ Evaluation Of Revenue Orchestration Platforms For B2B Is Live](#), Forrester Blogs.

[The Forrester Wave™: Revenue Orchestration Platforms For B2B, Q3 2024](#), Forrester Research, Inc., September 4, 2024.

[B2B Buyers Don't Care About Your Pipeline — Marketers And Sellers Need New Ways To Partner](#), Forrester Research, Inc., June 20, 2024.

Seth Marris, [When It Comes To Sales And Marketing Alignment, Data Needs To Come Before People](#), Forrester Blogs.

Seth Marris, [It's Time For Sales Leaders To Coach Sellers Like Athletes](#), Forrester Blogs.

Anthony McPartlin and Seth Marris, [A New Supergroup For Revenue Technology Emerges: Revenue Orchestration Platforms](#), Forrester Blogs.

[Three Revenue Tech Categories Converge Into One: Revenue Orchestration Platforms](#), Forrester Research, Inc., April 5, 2024.

[Conversation Intelligence Is Key To Unlocking Sales Productivity](#), Forrester Research, Inc., July 12, 2023.

[The Forrester Wave™: Sales Engagement Platforms, Q3 2022](#), Forrester Research, Inc., September 27, 2022.

APPENDIX C: ENDNOTES

¹ Source: [Budget Planning Guide 2025: Revenue Operations](#), Forrester Research, Inc., August 1, 2024.

² Source: [The Revenue Orchestration Platforms For B2B Landscape, Q1 2024](#), Forrester Research, Inc., March 27, 2024.

³ Total Economic Impact is a methodology developed by Forrester Research that enhances a company's technology decision-making processes and assists solution providers in communicating their value proposition to clients. The TEI methodology helps companies demonstrate, justify, and realize the tangible value of business and technology initiatives to both senior management and other key stakeholders.

⁴ Source: [The Revenue Orchestration Platforms For B2B Landscape, Q1 2024](#), Forrester Research, Inc., March 27, 2024.

⁵ Source: Seth Marrs and Jessie Johnson, [What Salesloft's Acquisition Of Drift Means](#), Forrester Blogs.

⁶ Source: [Forrester Glossary](#), Forrester Research, Inc.

The image features a dark green background with several overlapping, organic, wavy shapes in varying shades of green and dark teal. The word "FORRESTER" is centered in a white, serif, all-caps font. A registered trademark symbol (®) is located at the top right of the word.

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