

Sales Engineering

2024 Compensation & Workload Report



ABOUT CONSENSUS

Buying software, especially enterprise software, has become a slow and frustrating process. Changes to buyer behaviors, more asynchronous buying journeys, and bigger buying groups caused waves of disruption in B2B. With more buyers looking for a self-service process, vendors were getting left out of the conversation and getting pulled in later on in the process. But the one thing that remained true was that when buyers did engage, they preferred Presales interactions.

This caused the demand for Presales resources to grow across the entire customer lifecycle. But there has been a gap between that demand and the availability of Presales talent to deliver it, creating bottlenecks that could delay and even kill deals. The problem was no one knew how to successfully scale Presales.

For the past several years, we've researched these trends in our annual Compensation and Workload study and found that traditional hiring didn't fix these demand issues. At the same time, buyers were being held hostage to sellers' calendars and cycles because they were operating under the assumption that they close deals. Garin Hess, Founder of Consensus, determined from the data that "sellers can't close deals; only buyers can."

What buyers really want is to be enabled. They want authentic, guided, and frictionless buying, and they want more of it on-demand.

We've found that when sellers make buying easy, their revenue soars. Consensus' patented demo automation platform gives buyers an easier experience while multiplying sellers' impact. Our research informs our strategy. We are purpose-built for scaling Presales and enabling buyers. For more information, visit our website at www.goconsensus.com.

Table of Contents

04 EXECUTIVE SUMMARY

05 ADVANCE PRAISE

07 HIGHLIGHTS

08 ABOUT THE SAMPLE

- 09 Geographic Location
- 10 Demographics
- 11 Company Information
- 13 Professional Role
- 14 Total Presales Experience
- 15 Years of Experience in Current Role
- 16 Time at Current Organization
- 17 Generalists vs. Specialists
- 18 Solutions Supported
- 19 Deming to Prospects
- 20 Software Purchasing
- 22 Software Purchasing Experience

23 COMPENSATION

- 24 OTE at a Glance
- 26 OTE by Years of Experience
- 28 Predicting OTE: Getting More Granular Than "Average"
- 29 Minor Predictors of OTE
- 30 Major Predictors of OTE
- 31 OTE by Years of Experience
- 32 OTE by Hours Worked
- 33 OTE by AE:SE Ratio
- 34 OTE by Product Demos
- 35 OTE by Rank
- 37 OTE by Stock Options
- 38 OTE by Time Spent as Specialist
- 40 Compensation by Region
- 48 Advancement
- 49 Searching for Greener Pastures

53 WORKLOAD

- 54 Presales Work Week
- 55 Presales Crunch Week
- 58 Presales Activities: Misallocation
- 62 Total Misallocation
- 63 Presales Activities: Moving the Needle
- 65 AE:SE Ratio
- 66 Hiring ICs
- 67 IC Onboarding Time
- 69 Supporting Different Revenue Functions: Sales
- 70 Supporting Different Revenue Functions: Marketing
- 71 Supporting Different Revenue Functions: Customer Success
- 72 IC Assignment
- 73 Presales KPIs
- 74 Performance Quota
- 75 Measuring Quota
- 77 Presales vs. Sales Influence
- 78 Presales Influence Over Time
- 80 Multilingual Strategies
- 81 Languages

82 DEMOS

- 83 Demos Per Week
- 85 Staff Hours Per Demo
- 86 Stakeholders Per Deal
- 88 Repetitive Demos
- 89 Unqualified Demos
- 90 Tracking "No Decision" Rates
- 92 Demo Lag Time
- 98 Sales Cycle

102 BURNOUT

- 103 Costs of Burnout
- 104 Key Drivers of Burnout
- 109 Quality of Work Life
- 111 Reducing Burnout

112 ADOPTION OF DEMO AUTOMATION

- 114 Scaling Presales Resources

116 DISCOVERY

- 117 Actual Discovery Completed
- 118 The Impact of Discovery

Executive Summary

As part of the Presales team, navigating the intricacies of your role can be daunting. How much time should you spend on high- vs. low-value activities? How do you maintain work-life balance while securing fair compensation? Is job hopping really a shortcut to higher earnings and promotions? And crucially, how do you leverage the right tools, processes, and methodologies to ensure your contributions are as impactful as possible?

These questions are just a glimpse into the myriad of concerns that keep Presales team members awake at night. Enter our fifth annual "**Sales Engineering Compensation & Workload Report.**" Through rigorous analysis of comprehensive responses from nearly 1,000 Presales Leaders and Individual Contributors, our findings navigate the complexities of Presales roles today.

We deliver not just data, but a roadmap of actionable insights for Presales professionals to identify the moves they need to be making right now, as well as for companies to figure out how to get more out of their Presales teams.

On Leaders and Individual Contributors

Leader titles include Sales Engineering managers and above, as well as Sales leadership roles that bear responsibility for Sales Engineering.

Individual Contributor (IC) titles include Sales Engineers (SEs) and similar variants such as Solutions Consultant, Senior Sales Engineer, Principal Sales Engineer, etc.

This report is governed by the licensing terms found [here](#).

Advance Praise

"I just finished reading the Sales Engineering Compensation & Workload Report. There are some incredible insights in there. Three areas of the report that really jumped off the page for me were around KPIs, burnout, and seat at the table. Don't waste a minute. Get in there and start reading it!"



TODD JANZEN

Global VP Solution Engineering, Q Branch | Salesforce

"Are you curious about how your fellow SEs are being compensated? Or how much time they are spending on different tasks like demos or discovery? If so, you are going to want to check out the Consensus Sales Engineering Compensation & Workload Report put together by our friends at Consensus."



JULIE HANSEN

Founder | Performance Sales Training

"The Consensus Sales Engineering Compensation & Workload Report offers a goldmine of insights to help Presales Leaders and Enablement properly support and develop their Presales Team, and work together better with their Sales counterparts to become more efficient and close more deals, impacting the entire Selling and Buying process."



ART FROMM

Owner & Founder | Team Sales Development Inc.

"I am absolutely delighted to see the release of Consensus' Sales Engineering Compensation & Workload Report. Some individuals and organizations will simply use the report to compare their situations with their peers. Others will identify and pursue opportunities for change and improvement, and THAT is the real power of the report."



PETER COHAN

Founder | Great Demo!

Advance Praise

"Presales organizations have traditionally lacked quality insight into best practices, benchmarks, and other data with which to better understand their own efficiency and how they compare to industry best practices and norms. Consensus' landmark SE Compensation and Workload Report continues to admirably fill that gap, not only through an incredibly expansive set of data, but with unique insights that aren't available anywhere else."



KERRY SOKALSKY

Founder & President | Presales Mastery

"I just finished the Consensus Sales Engineering Compensation & Workload Report. It is a great piece of work, and I learned 1) We are hiring more than ever from outside the industry, 2) the second most common KPI is "satisfaction from sales," which I find concerning, and 3) We have an overwhelming focus in Presales on demos, and I think we should be spending more time on relationship building and discovery."



JOHN CARE

Managing Director | Mastering Technical Sales

"By shifting intro demos toward discovery, we enhance [Sales Engineers'] value and enable our teams to feel more impactful. Discover more insights in the Sales Engineering Compensation & Workload report – let's make every demo count!"



NATAJA BAX

Founder, Trainer & Coach | The DemoScene

HIGHLIGHTS

New and Notable This Year

COMPENSATION

- Recently hired ICs report higher OTE than their tenured counterparts, while the opposite is true for Leaders. (pg. 27)
- Stock options are a newer perk for ICs in the last four to six years. (pg. 37)
- Personal quotas are a major predictor of higher OTE and base salary for ICs. (pg. 24)

WORKLOAD

- Too much time is spent on Intro Demos; not enough time is used developing product expertise. (pg. 58)
- ICs and Leaders want the perks of their Sales counterparts, less repetition, and more help. (pg. 108)

DEMOS

- More unqualified demos predict greater misallocation of time spent on Intro Demos. (pg. 60)

BURNOUT

- Misallocating time and resources fuels burnout, draining productivity and perpetuating a cycle of inefficiency and frustration. (pg. 62)
- Unqualified demos are comparable to long work hours in predicting burnout. (pg. 102)

DEMO AUTOMATIONS

- Automation optimizes IC time to be spent on higher-impact activities. (pg. 113)



About the Sample

Frequency by Region



72
Canada

622
United States

17
South America/
Mexico

193
Europe

195
United Kingdom

2
Africa

18
Middle East

26
South Asia

15
Asia/Pacific

37
Australia/
New Zealand

ABOUT THE SAMPLE

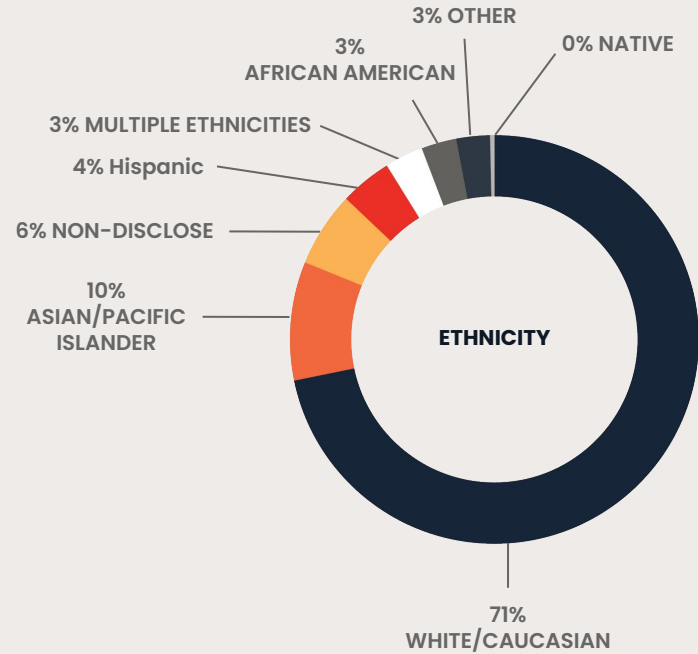
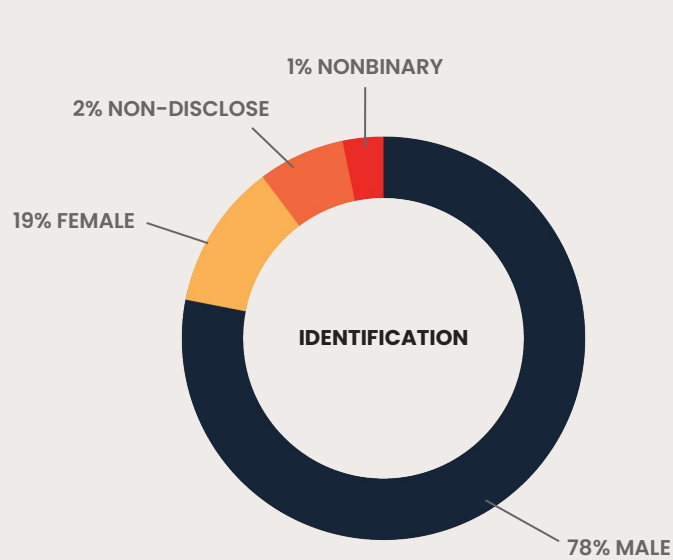
Geographic Location

We gathered over 1,000 responses* from Sales Engineers around the world. The following charts illustrate the general characteristics of survey respondents.

*Note: Sample sizes vary throughout the report because not all respondents answered all questions.

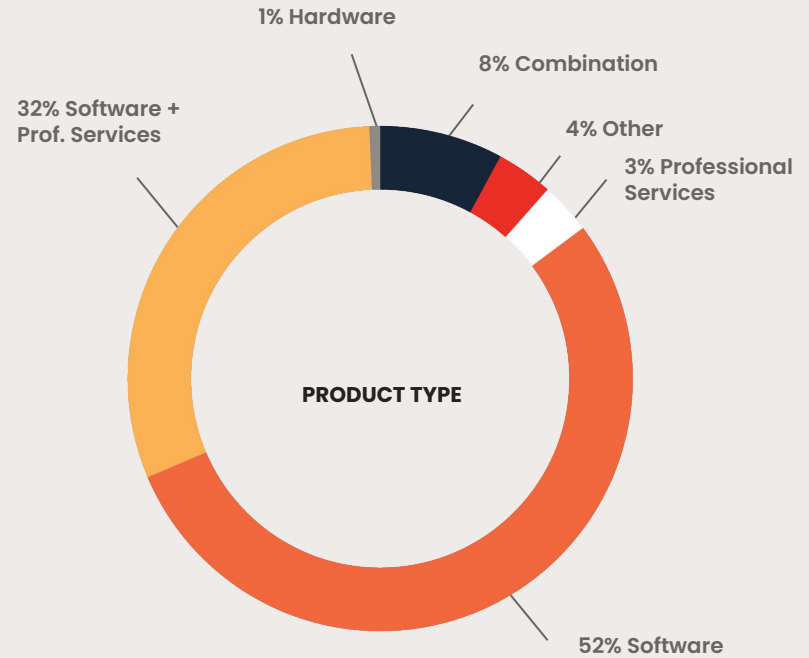
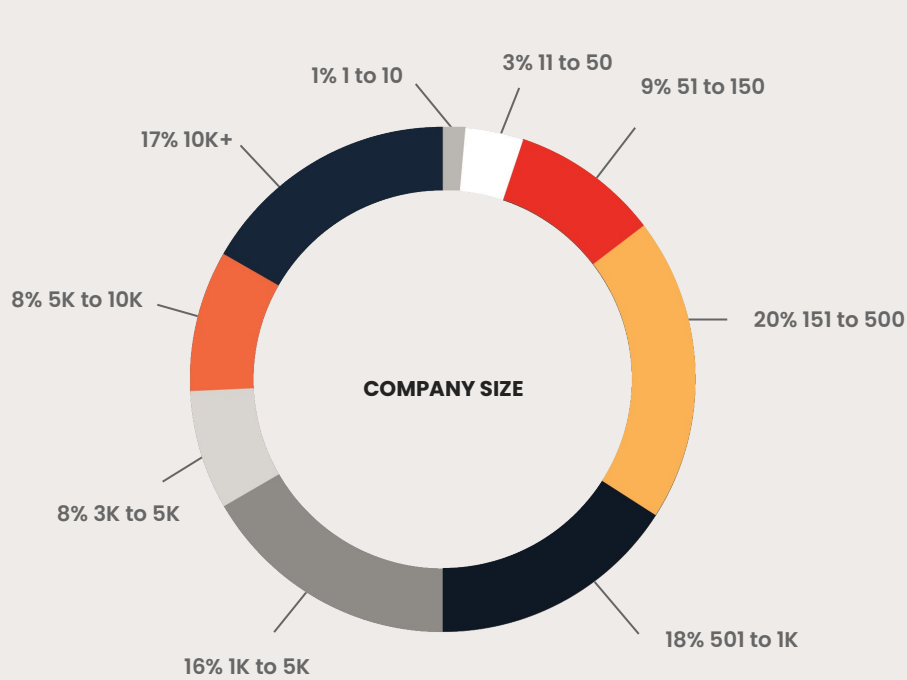
ABOUT THE SAMPLE

Demographics



Company Information

*Note: Respondents could select multiple options.



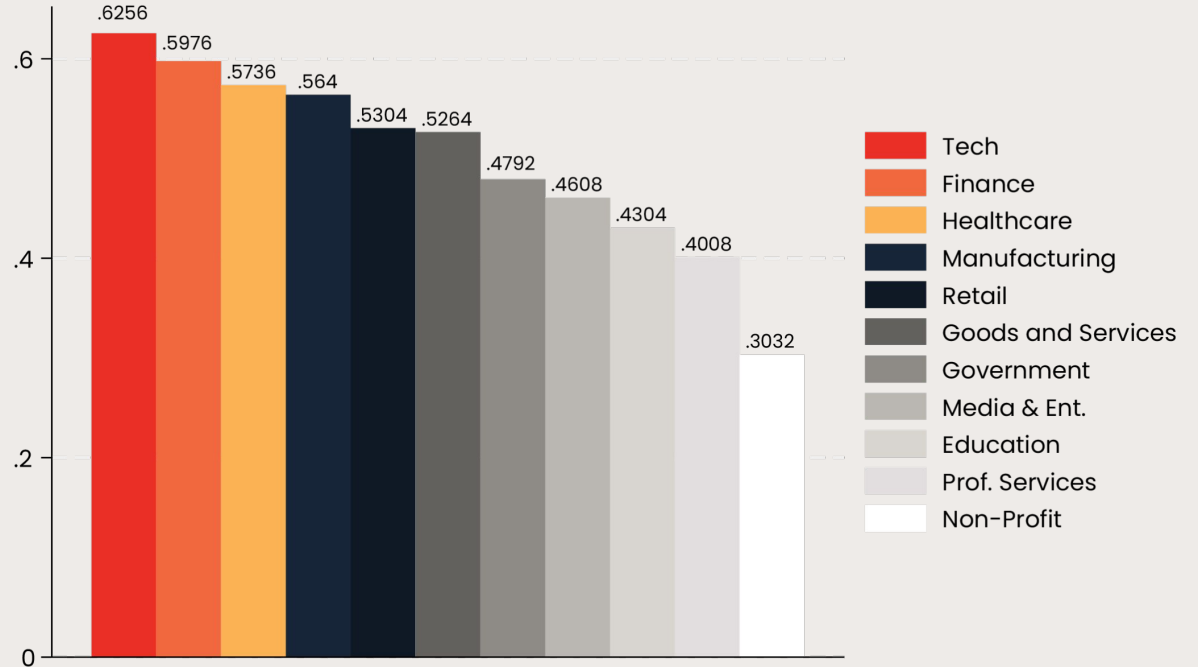
ABOUT THE SAMPLE

Company Information

75% of the sample supports customers of in at least two industries; and nearly 25% of the sample supports customers in all 11 industries.

*Note: Respondents could select multiple options.

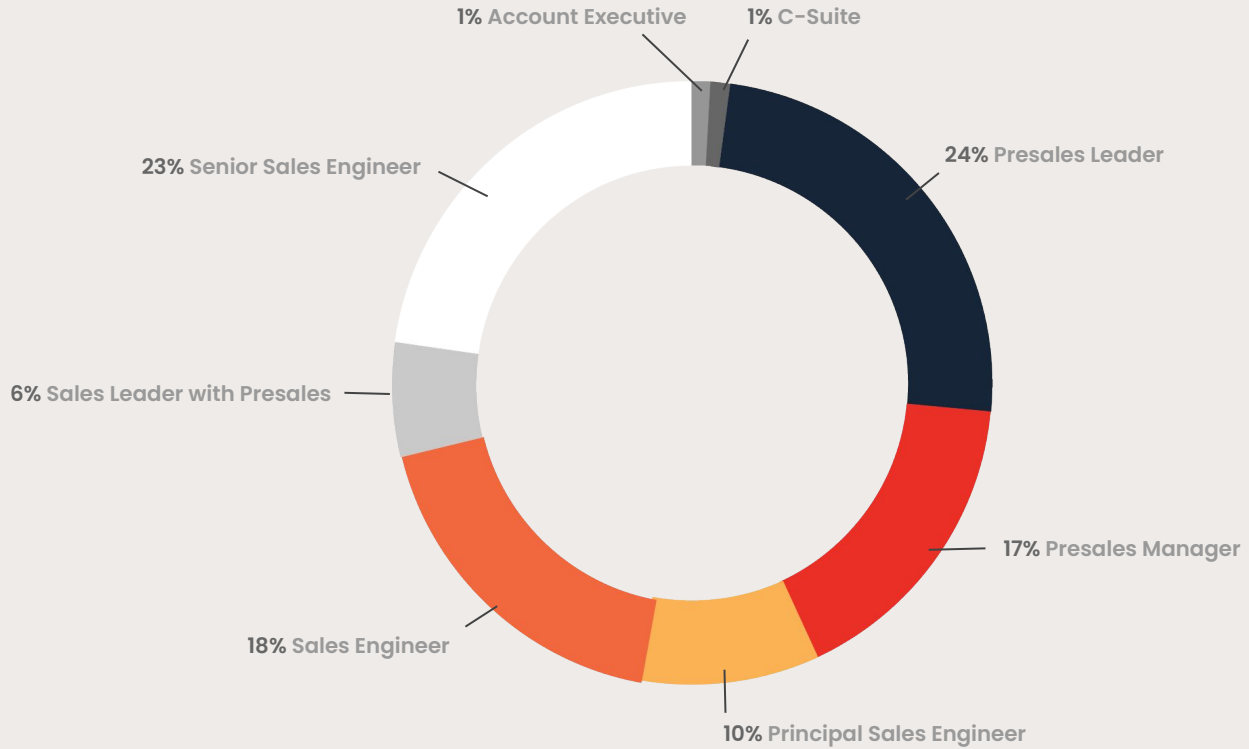
Percent of the Sample with Customers in Each Industry



ABOUT THE SAMPLE

Professional Role

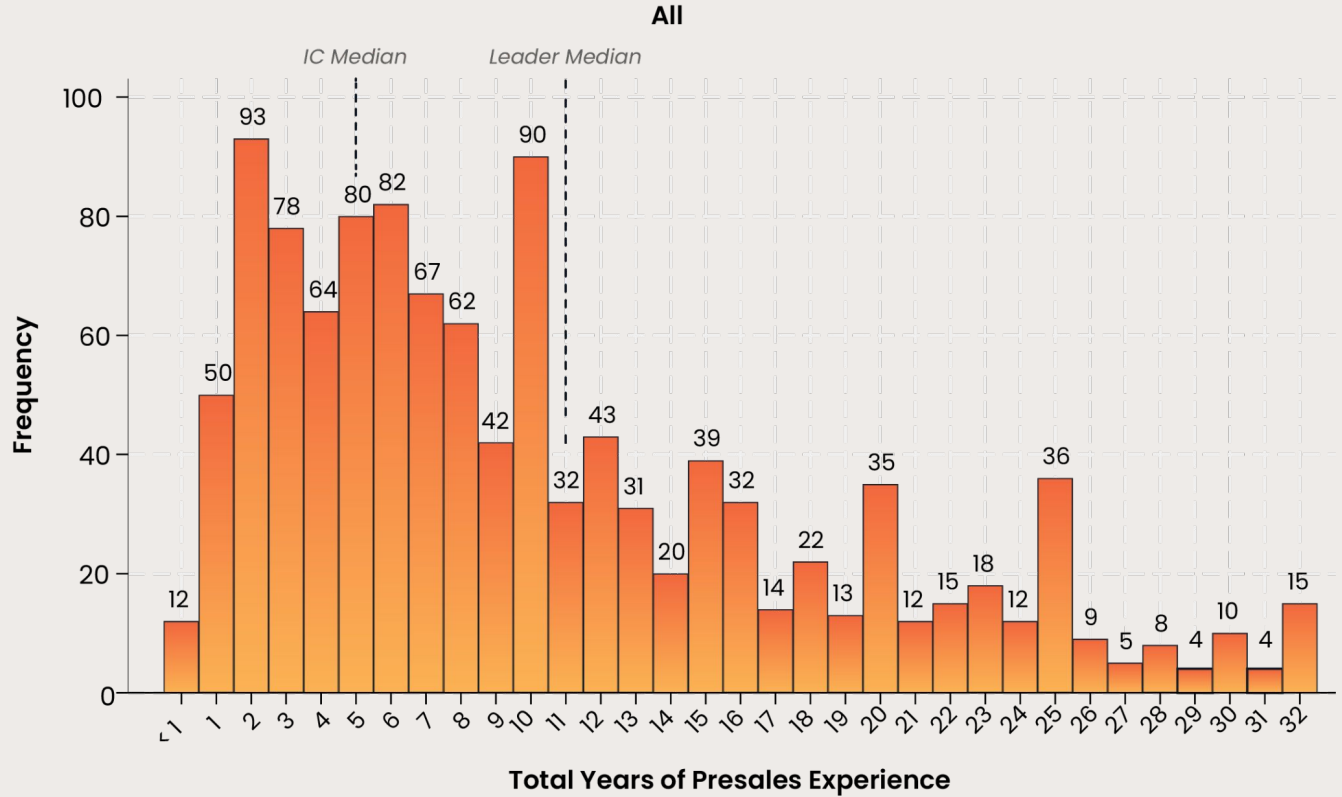
55% of respondents were ICs, while 44% were Leaders.



ABOUT THE SAMPLE

Total Presales Experience

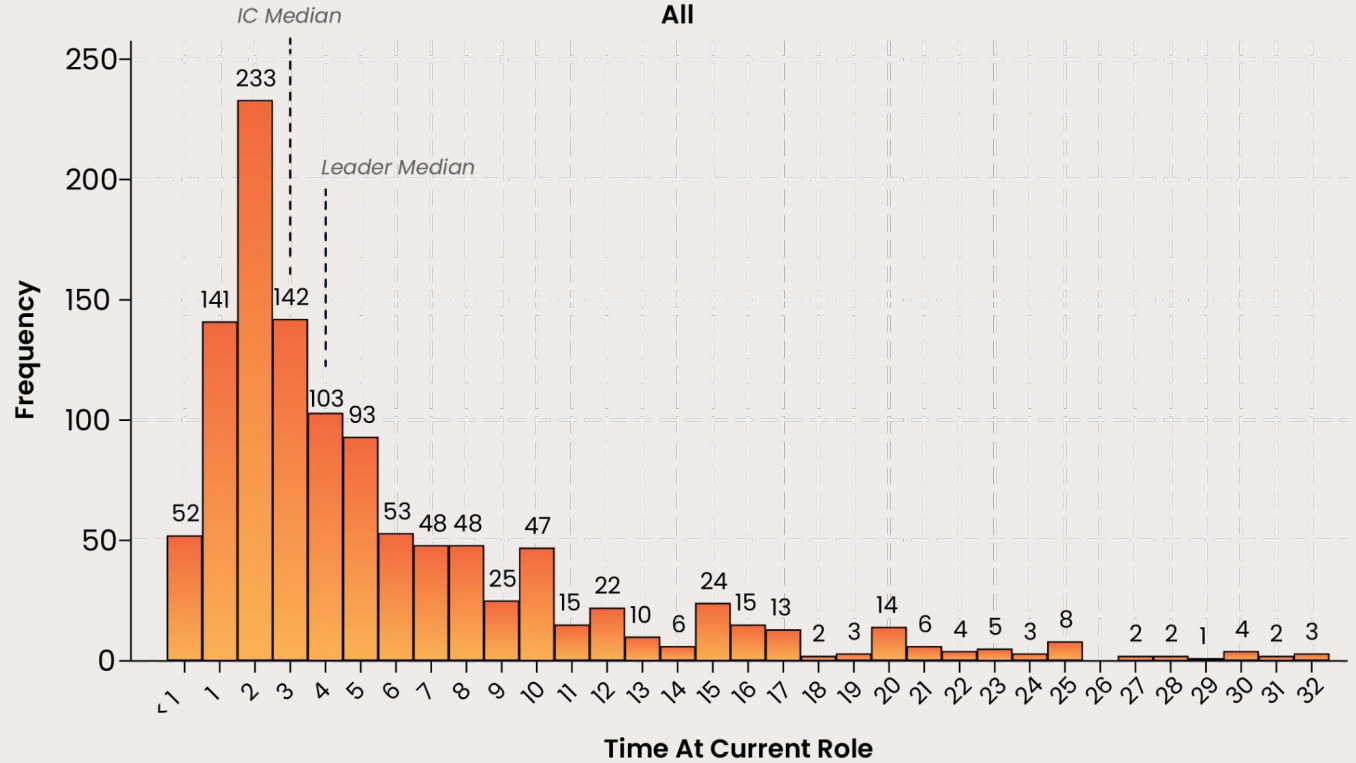
The typical Leader has almost double (11 years) the experience of the typical IC (5 years).



ABOUT THE SAMPLE

Years of Experience in Current Role

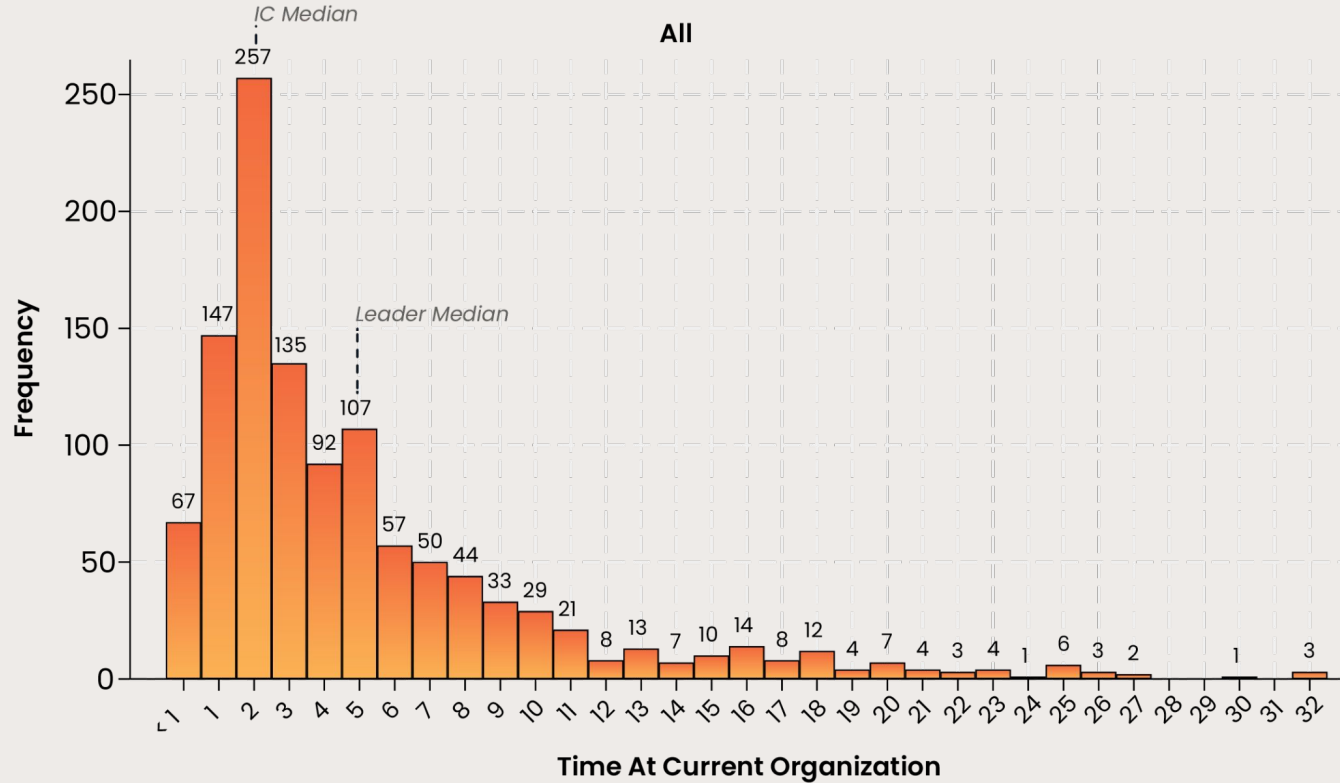
The typical Leader has been in their current role at least a year longer than the typical IC. Yet, there's a downward trend in tenure across the board: the median time respondents have remained in their current positions has consistently decreased from six years (2022) to five years (2023), and now to four years (2024).



ABOUT THE SAMPLE

Time at Current Organization

The tenure gap between Leaders and ICs within organizations is significant. Most Leaders have double the history with their current company than their IC counterparts. Meanwhile, most ICs have only been at their current organization for two years or less.

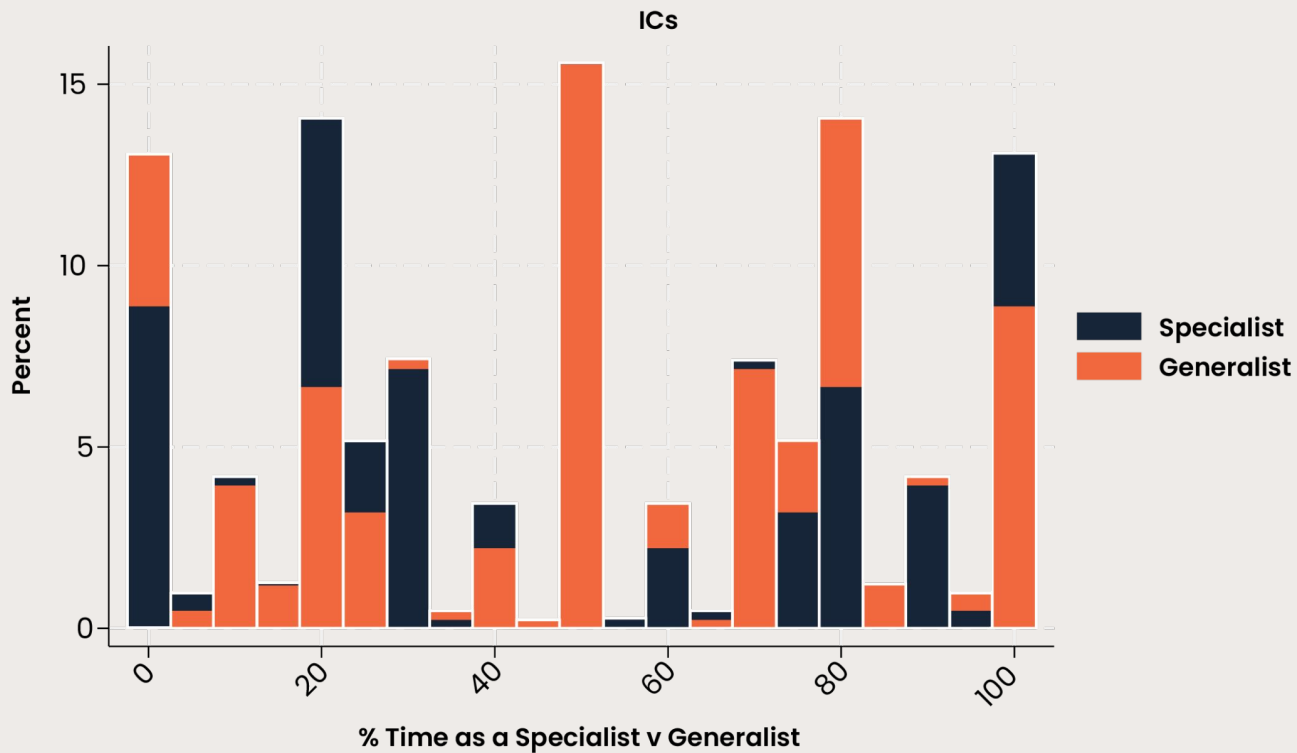


ABOUT THE SAMPLE

Generalists vs. Specialists

ICs tend to fall into one of three categories:

- 1. All or nothing: either specialist or generalist
- 2. 80/20: 80% of one and 20% of the other
- 3. 50/50: half and half



ABOUT THE SAMPLE

Solutions Supported

The median range of solutions supported by individual contributors (ICs) and Leaders has risen by an increase of one to two products compared to 2023.

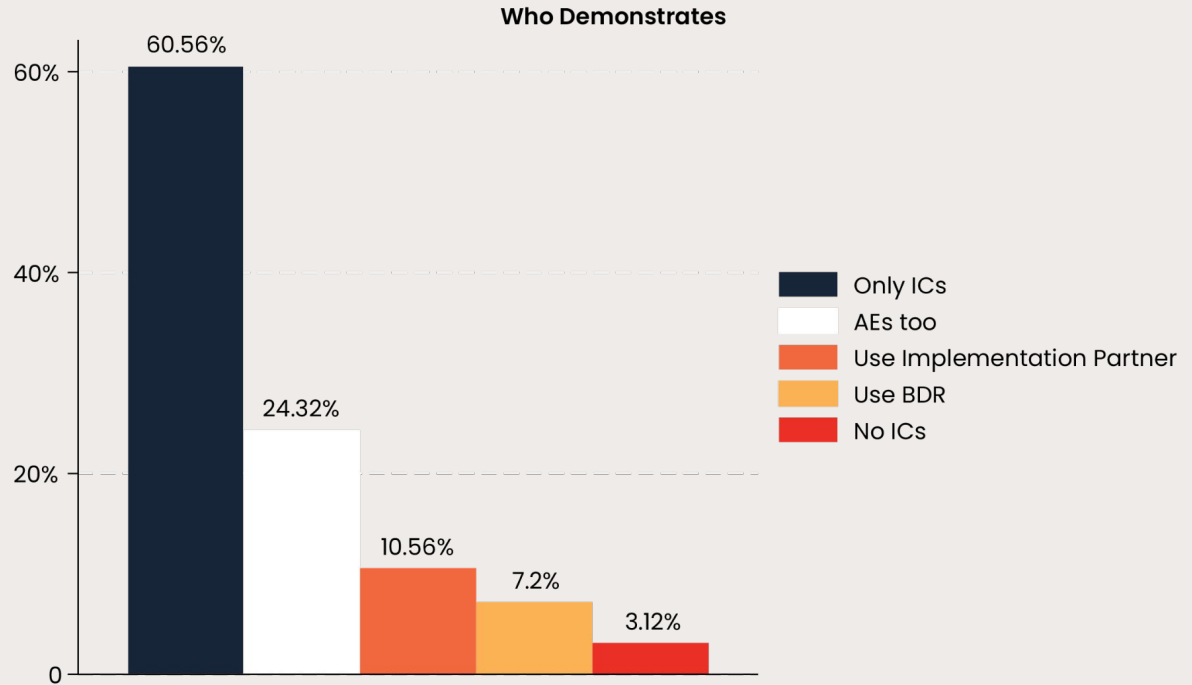


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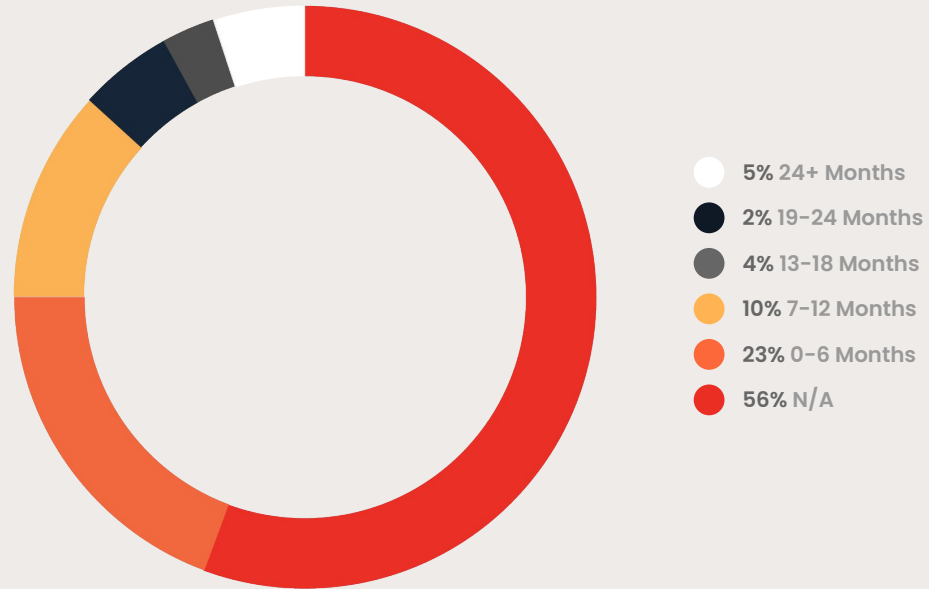
Deming to Prospects

Nearly 60% of firms rely solely on ICs to demo products.

*Note: Respondents could select multiple options.



How Many Months Since Participating in Software Purchase?



ABOUT THE SAMPLE

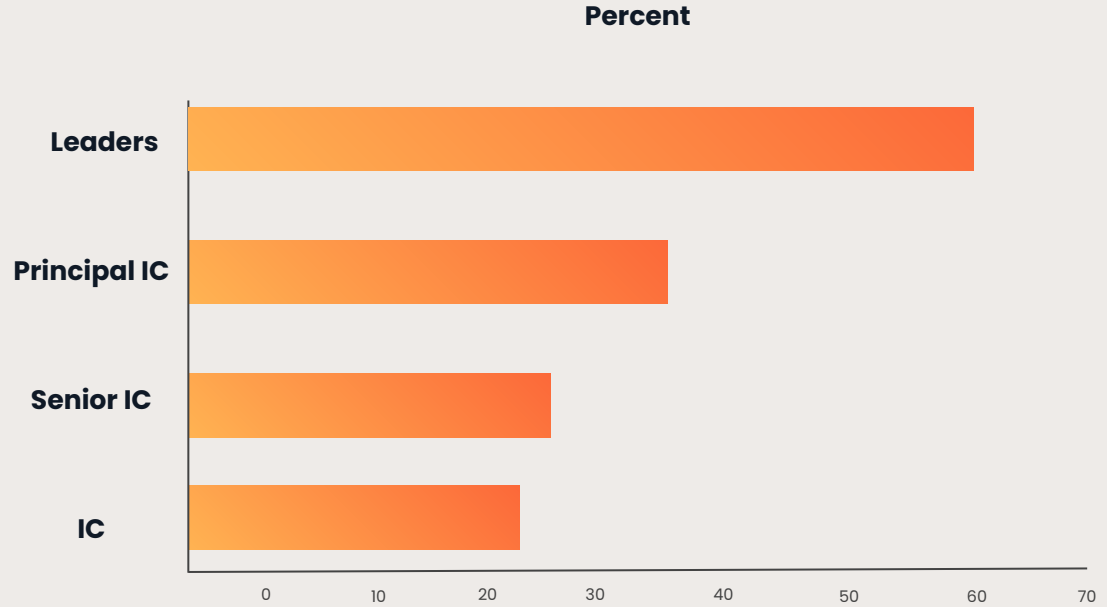
Software Purchasing

Over half of respondents have never engaged in a purchasing decision.

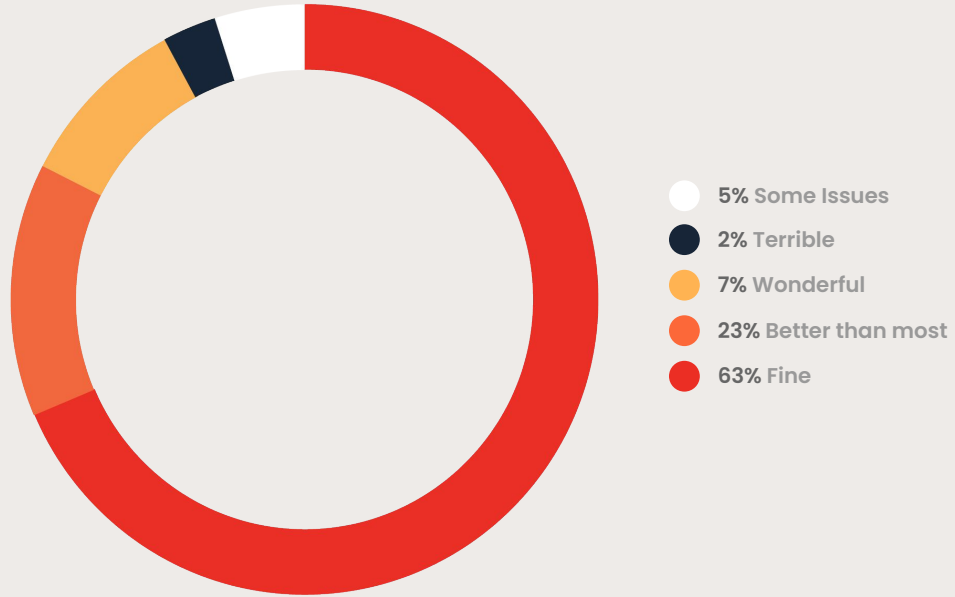
ABOUT THE SAMPLE

Software Purchasing (cont.)

Those in senior roles are more likely to engage in the purchasing process. 60% of Leaders purchased some software in the last 24 months compared to a little over 20% of less-senior ICs.



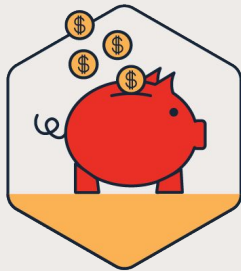
How Was Your Last Purchasing Experience?



ABOUT THE SAMPLE

Software Purchasing Experience

Very few SEs are excited about purchasing new software. Among those who purchase software, 63% rated their experience as "Fine."



Compensation



OTE AT A GLANCE

OTE = On-Target Earnings, or annual compensation, assuming they hit their quota or mid-level target

Since 2021, the economic landscape for the United States' highest earners has taken a challenging turn: adjusted for inflation, real wages — the actual purchasing power of income — have been on a downward trajectory.*

Relative to last year, the average experience within the 2024 cohort slightly decreased, with this trend being particularly noticeable in Canada and the U.K. However, when adjusting for other relevant factors, **nominal average salaries** have maintained their levels.

* This finding is limited to the U.S. due to the lack of CPI data for other countries.

** Note: All compensation amounts are shown in USD, regardless of the currency in which the participant is actually paid. This conversion is meant to facilitate more meaningful comparisons between regions.

Individual Contributors (ICs)

	OTE					Experience		Stock	Quota			
	Median	Mean	Min	Max	Count	Total	Role		Personal Only	Both	None	Team Only
USA	185,000	193,460	64,000	552,000	203	5	3	61%	15	10	32	43
UK	124,000	133,288	55,500	325,000	54	5	3	54%	16	7	46	31
EU	128,640	130,373	50,000	340,000	55	7	4	44%	11	9	33	47
CANADA	110,000	135,266	62,304	300,000	21	4	2	45%	27	0	41	32
AUSTRALIA/ NEW ZEALAND	194,878.5	186,529	84,000	343,600	16	6	3	88%	31	6	32	31

OTE AT A GLANCE

OTE = On-Target Earnings, or annual compensation, assuming they hit their quota or mid-level target

* This finding is limited to the U.S. due to the lack of CPI data for other countries.

** Note: All compensation amounts are shown in USD, regardless of the currency in which the participant is actually paid. This conversion is meant to facilitate more meaningful comparisons between regions.

Leaders

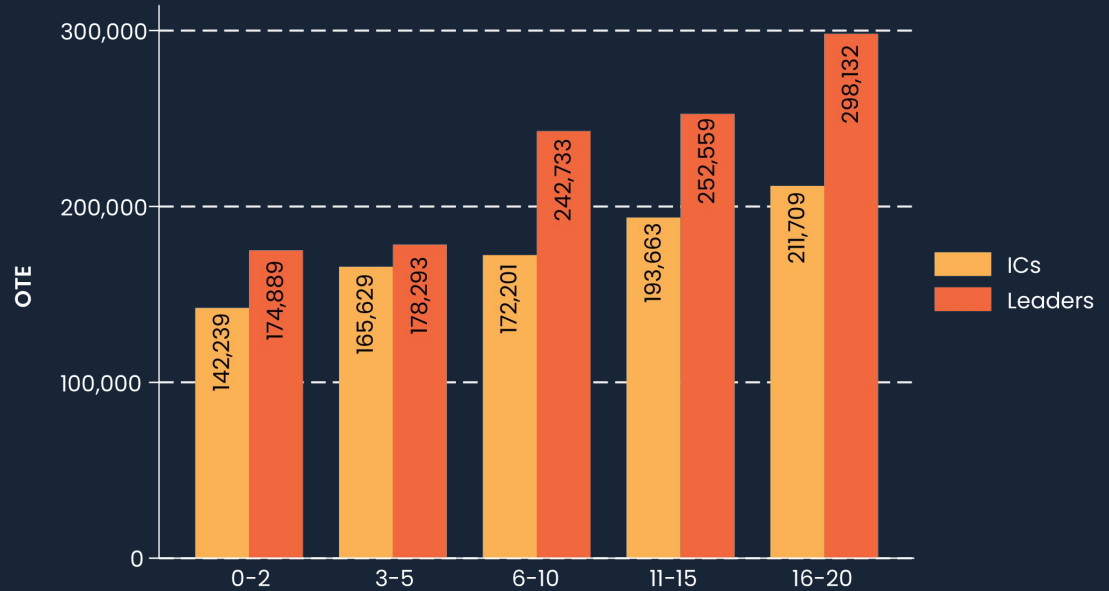
	OTE				Experience		Stock	Quota				
	Median	Mean	MIN	MAX	Count	Total	Role		Personal Only	Both	None	Team Only
USA	260,000	267,414	121,000	486,000	141	11	4	68%	5	11	34	50
UK	200,947	231,903	57,500	923,000	54	11	4	63%	7	9	34	50
EU	150,000	161,231	30,000	435,000	41	9.5	4	49%	7	5	43	45
CANADA	199,000	230,695	92,000	646,000	21	10	4	82%	14	5	41	40
AUSTRALIA/ NEW ZEALAND	250,000	242,666	120,000	310,000	9	13	4	89%	10	11	34	45

COMPENSATION

OTE by Years of Experience

Compared to ICs, Leaders experience a more rapid increase in their OTE as their **total years of experience** accumulate.

Average On Target Earnings by Total Years of Experience

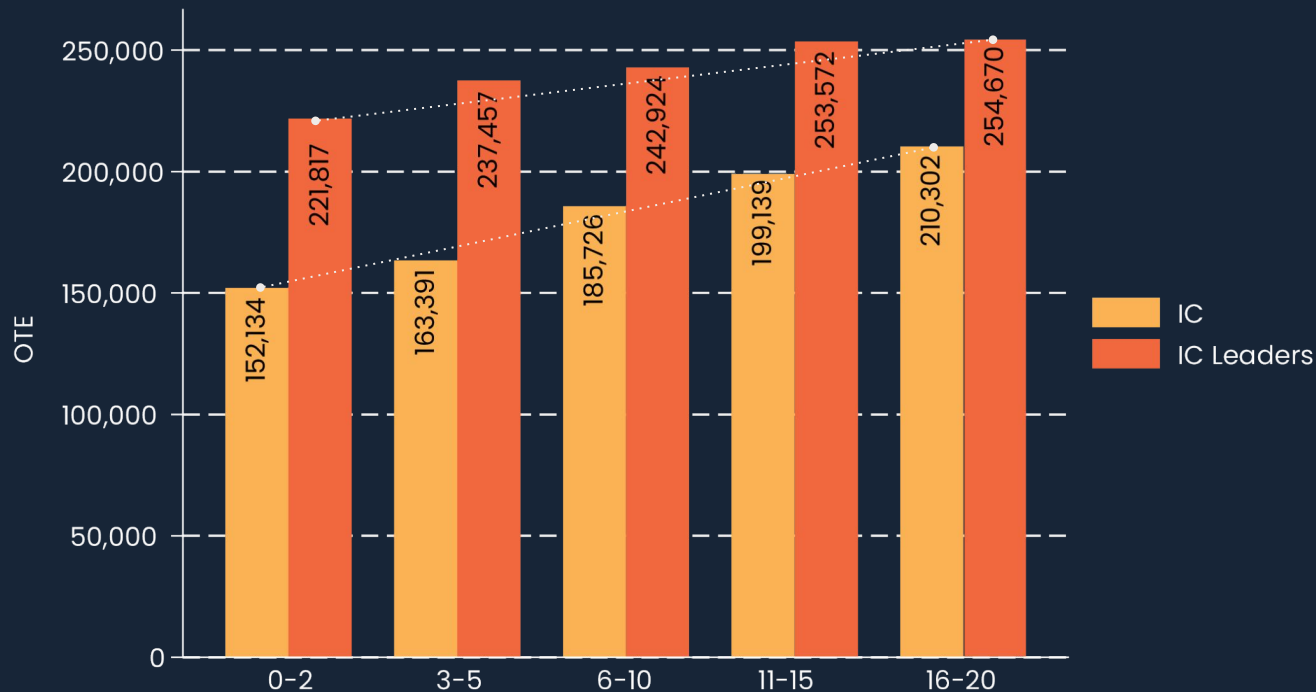


COMPENSATION

OTE by Years of Experience (cont.)

That said, ICs see a more significant increase in their OTE with **additional years of experience in their current role** compared to Leaders. Because Leaders already start at a higher pay, additional experience has a lower return.

Average On Target Earnings by Experience in Current Role

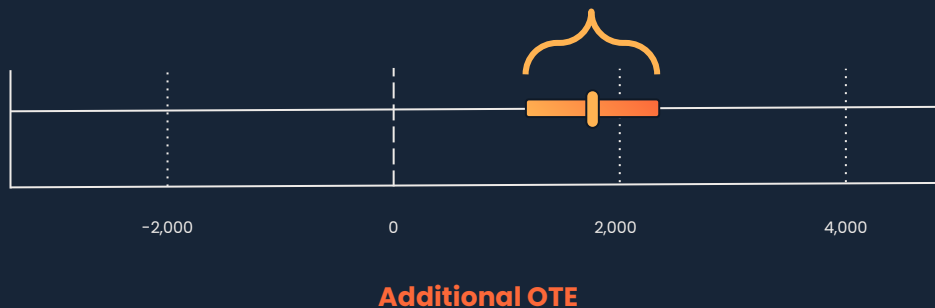


COMPENSATION

Predicting OTE: Getting More Granular Than "Average"

Knowing industry average OTEs can help SEs figure out if they're roughly in line with their peers. This year, however, we're introducing a new kind of chart that can help you better compare yourself against like for like peers. **The OTE predictors charts in the next two slides cover both minor and major predictors of how we would expect OTE to change given a set of conditions** e.g. how many years you've spent at a given role.

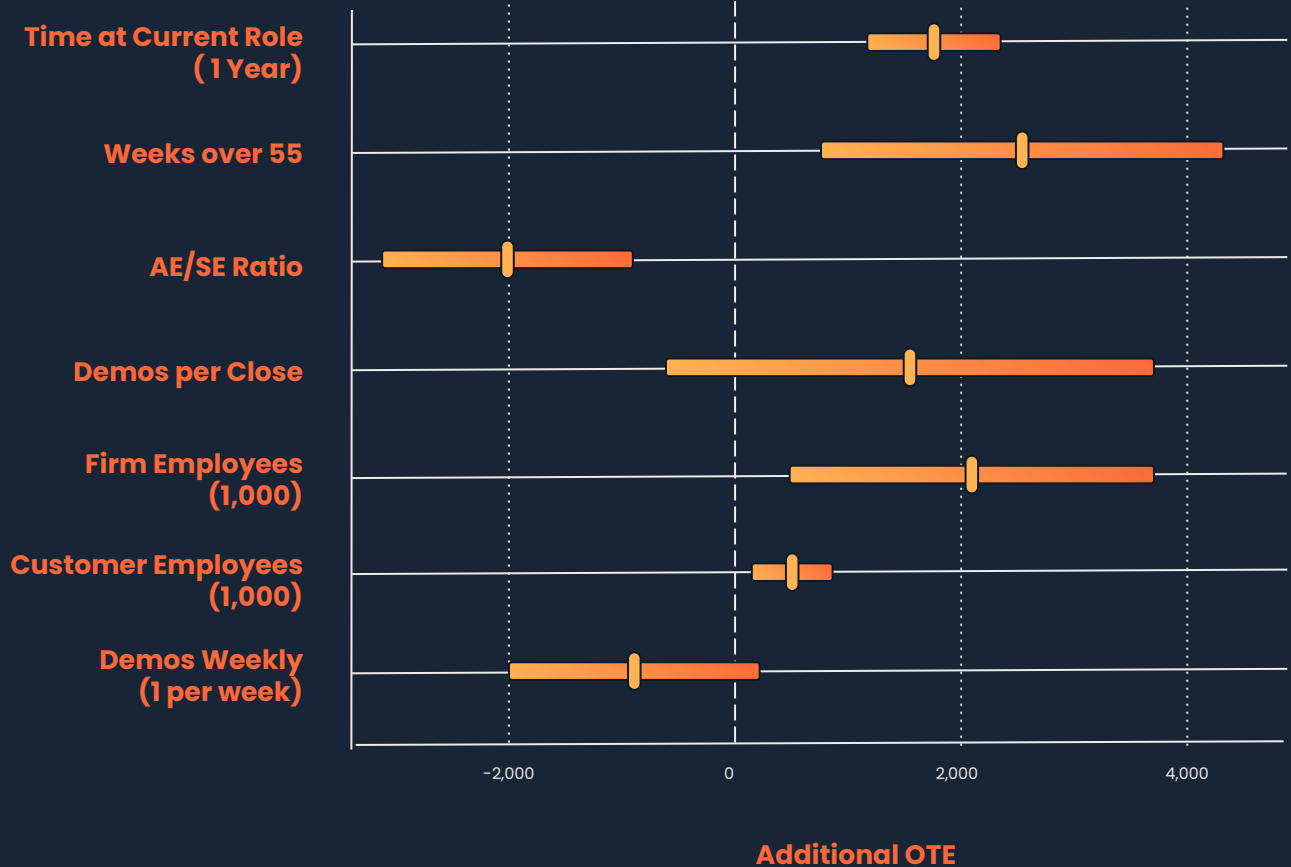
Time at Current Role (1 Year)



COMPENSATION

Minor Predictors of OTE

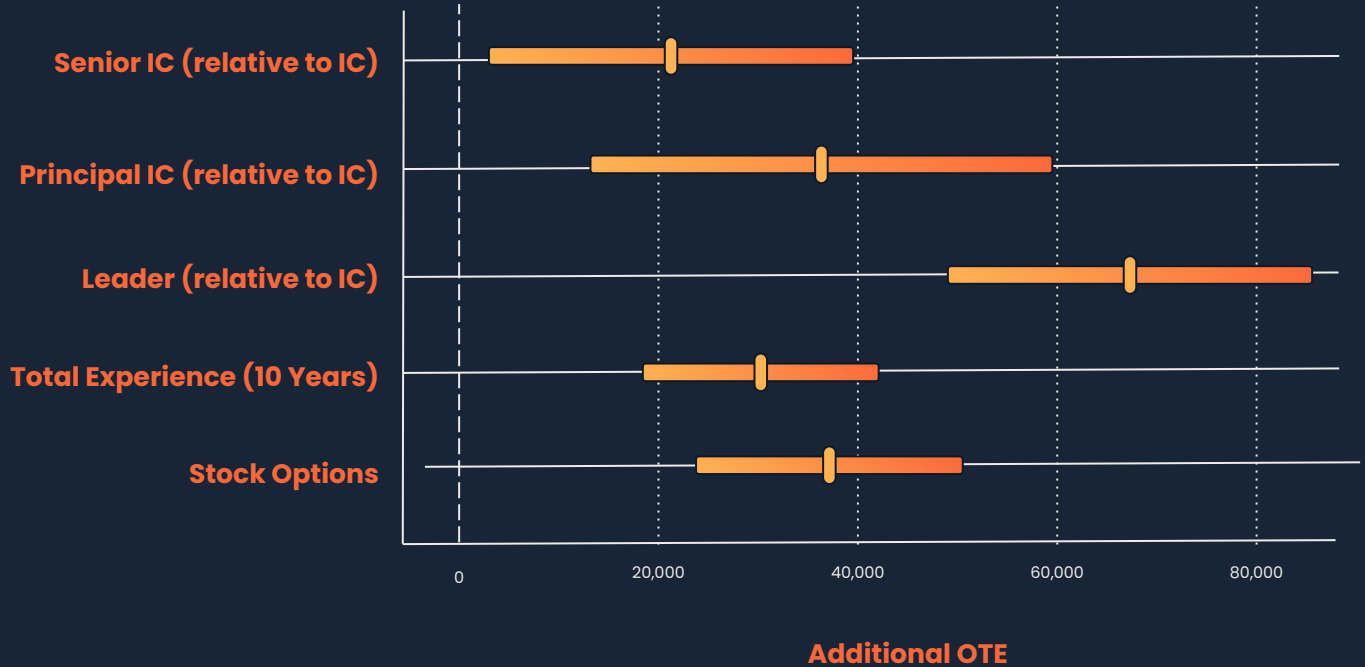
The minor factors influencing OTE include time spent in the current role, hours worked, and sales activity ratios.



COMPENSATION

Major Predictors of OTE

The major factors influencing OTE are years of experience, role, and stock options.

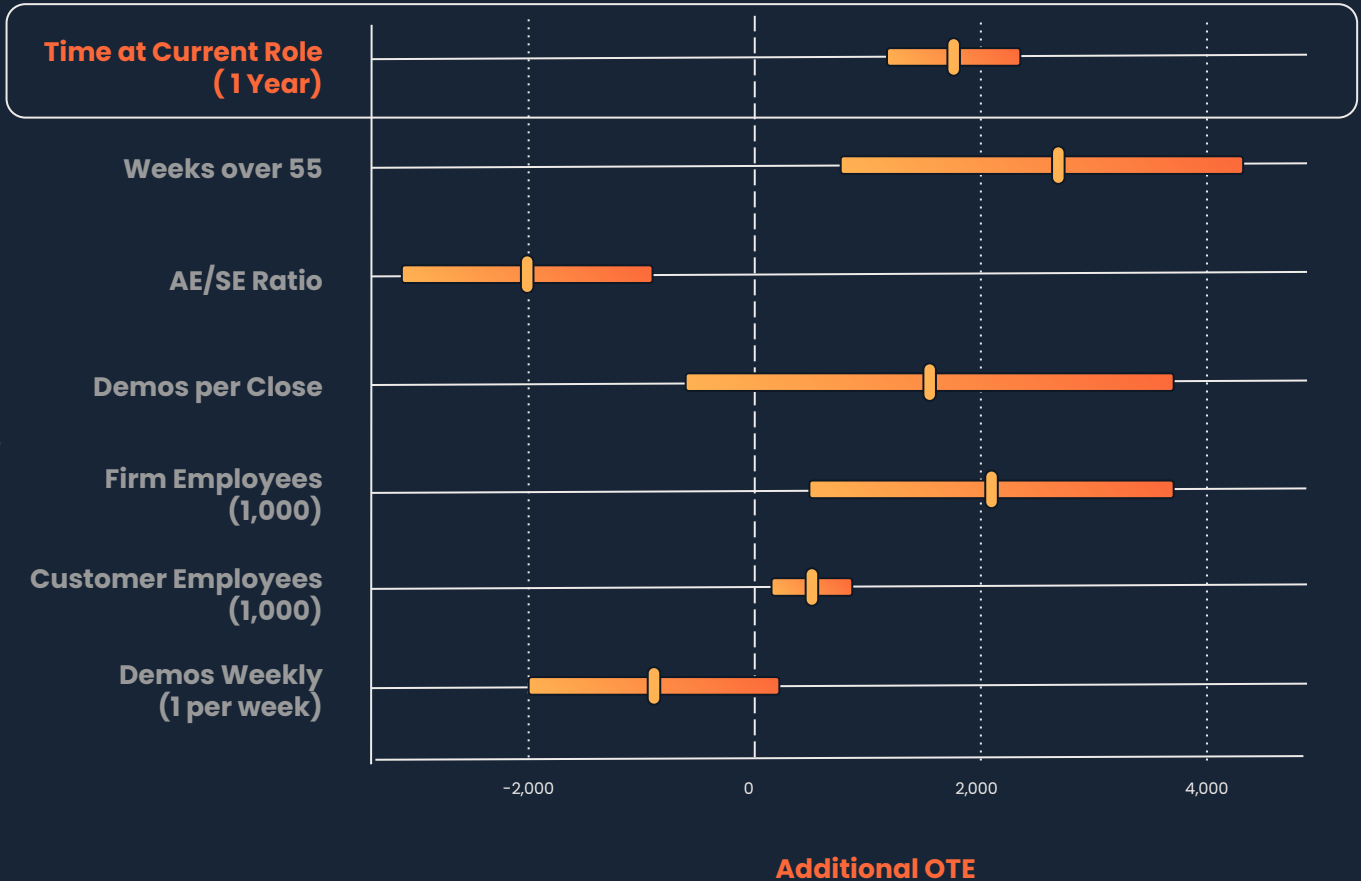


COMPENSATION

OTE by Years of Experience

Each additional year in the current role is associated with an average increase of \$1,636 in OTE, within a range of \$1,000 to \$2,200.

*Note: These findings suggest correlations, not causation, and should be interpreted with the understanding that other factors are also at play.

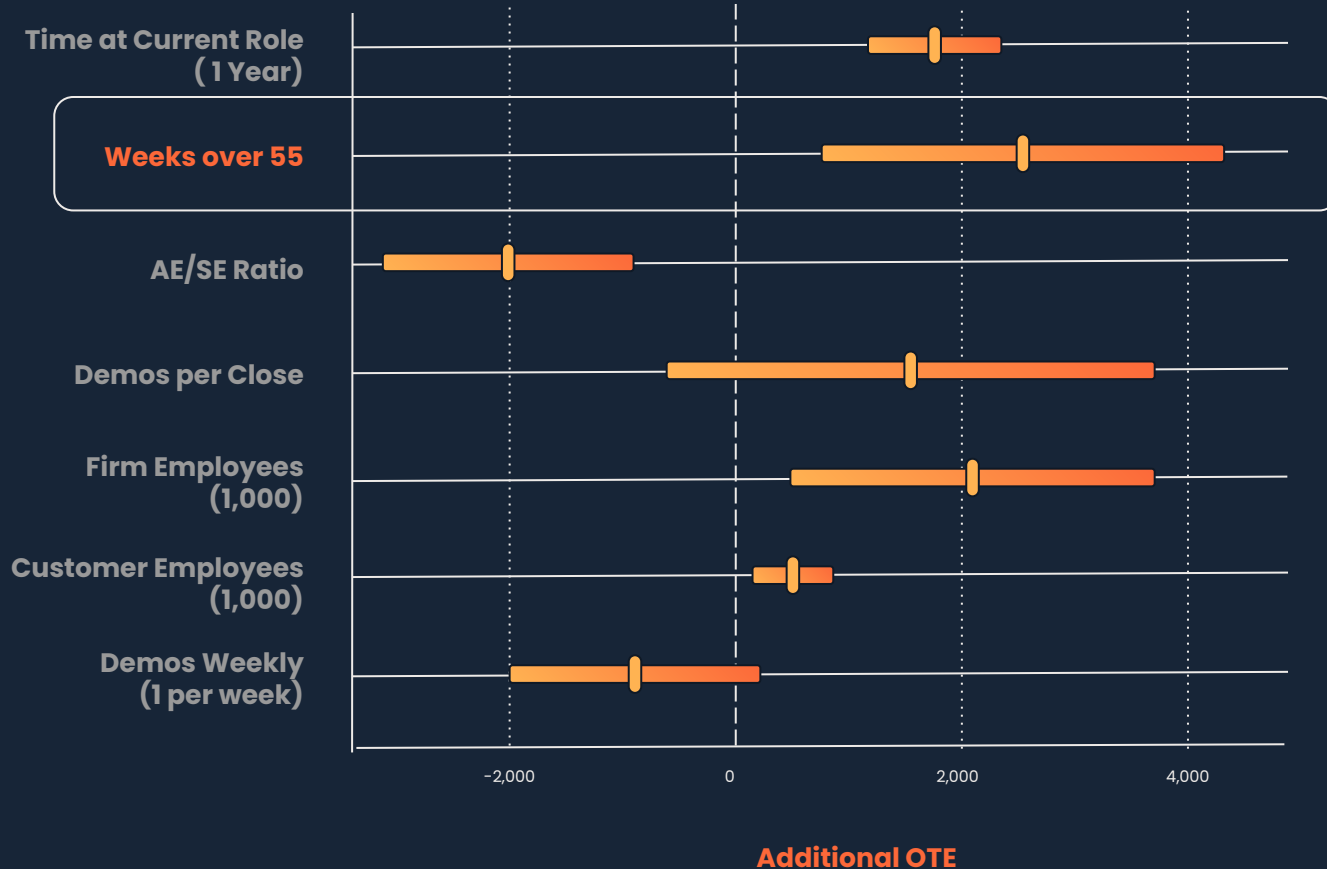


COMPENSATION

OTE by Hours Worked

More hours, greater earnings.

Working more than 55 hours in a week correlates with an additional \$2,623 annually.



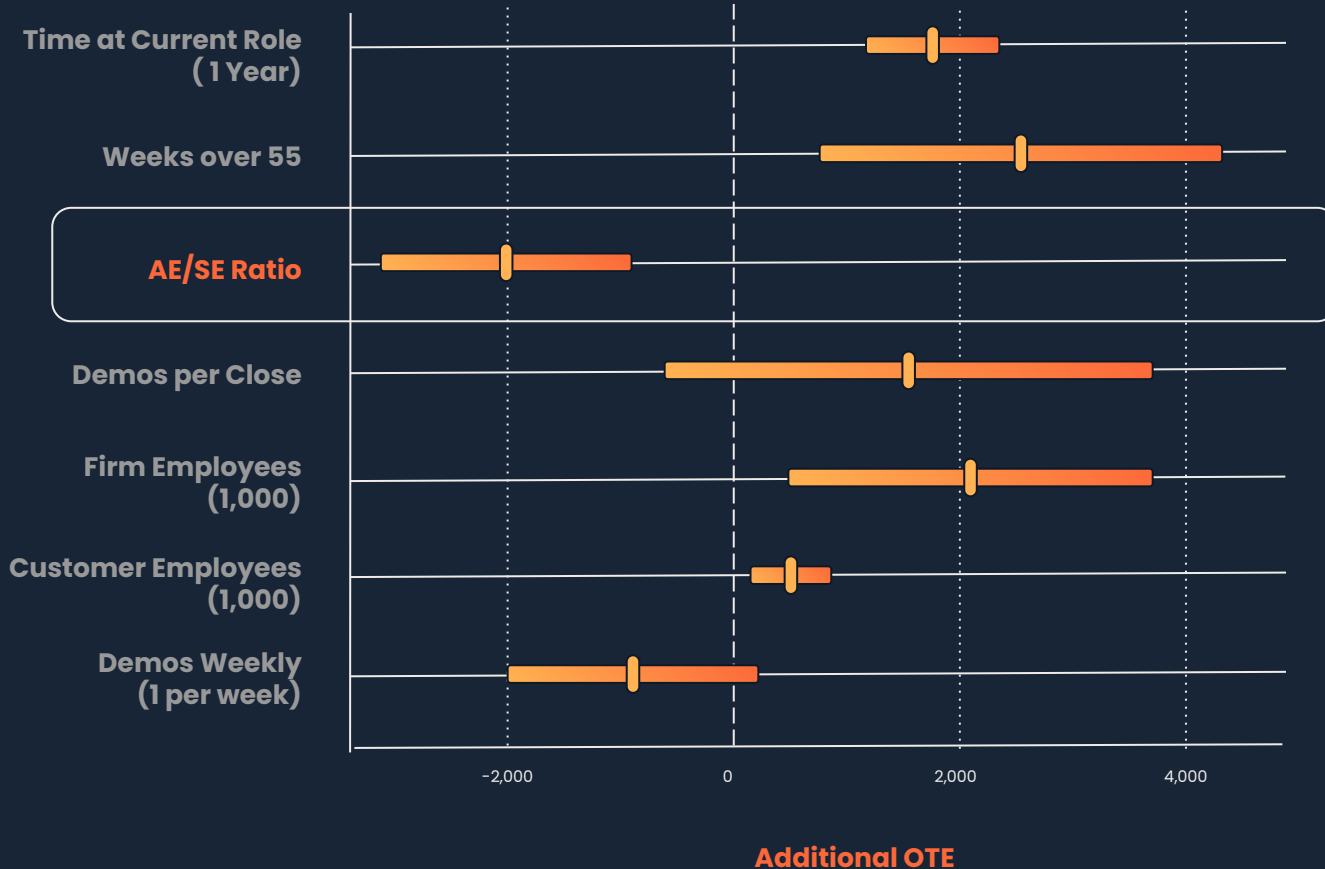
COMPENSATION

OTE by AE:SE Ratio

Higher earners report a lower AE:SE ratio.

In line with trends from previous years, as SEs gain experience, they typically progress to serve higher-end markets. This involves collaborating with Account Executives (AEs) to focus on more strategic enterprise accounts that often involve larger deal sizes.

As a result, a higher AE:SE ratio predicts a decrease of \$1,700 in OTE.

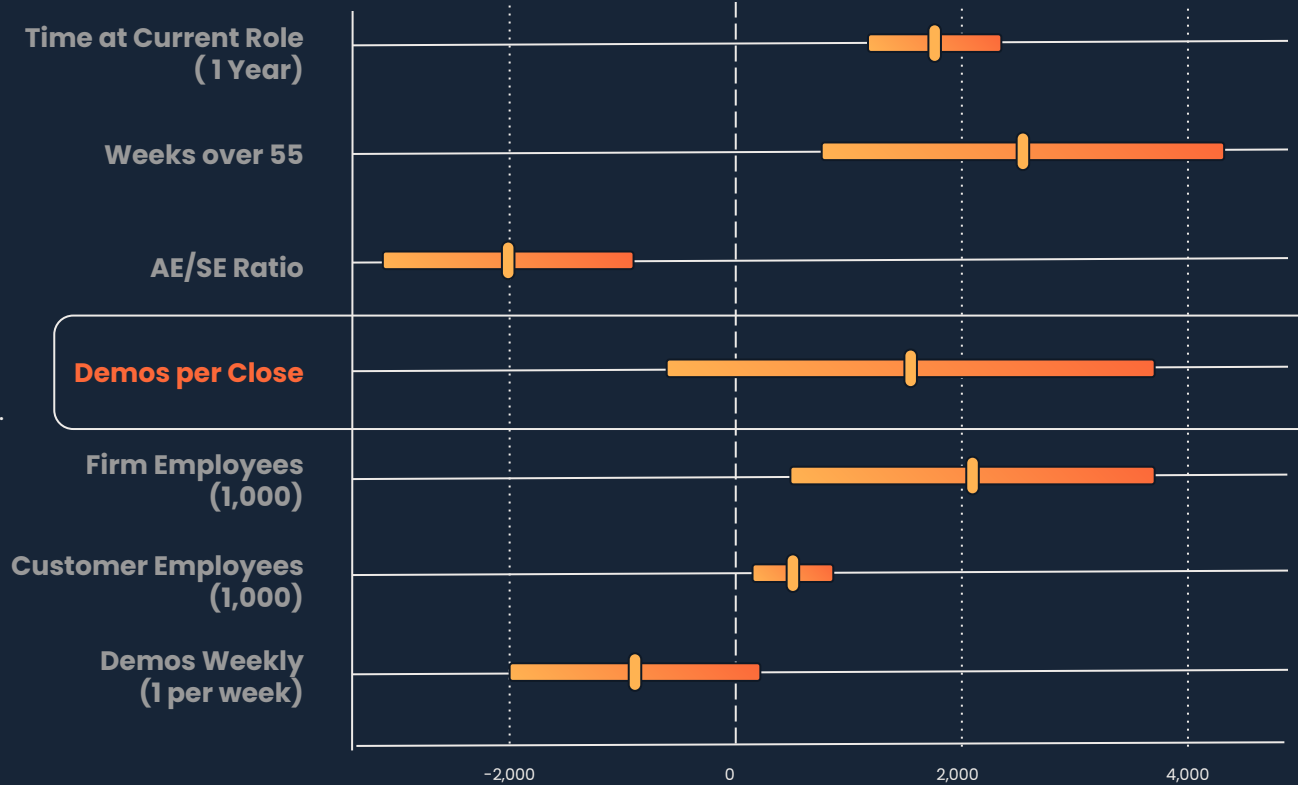


COMPENSATION

OTE by Product Demos

Increased demos correlate with higher earnings.

Each additional product demo required to close a sale could mean nearly \$1,600 more in yearly income. This suggests that when your best consultants get to consult, you win more. The product may offer value to the customer, but the customer cannot see it; instead, ICs demonstrate the value of the product to the customer. As a result, the more sophisticated the product, the more potential value to the customer, and you give your best ICs your best products.



Additional OTE

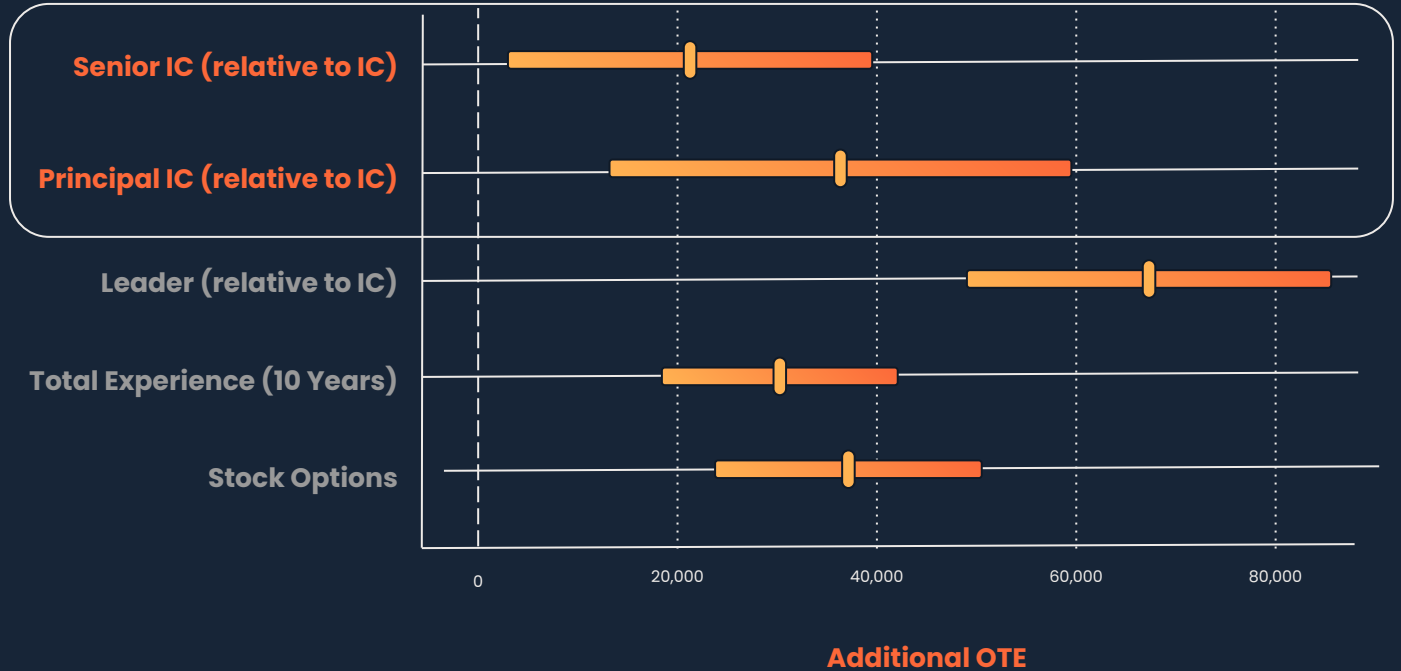
COMPENSATION

OTE by Rank

Rank matters for OTE.

When accounting for variables such as hours worked and company size, a Senior IC typically earns about \$20,000 more annually than a typical IC.

In the case of Principal ICs, their annual earnings range from \$180,000 to \$220,000, which is approximately \$20,000 to \$60,000 above the average for ICs.

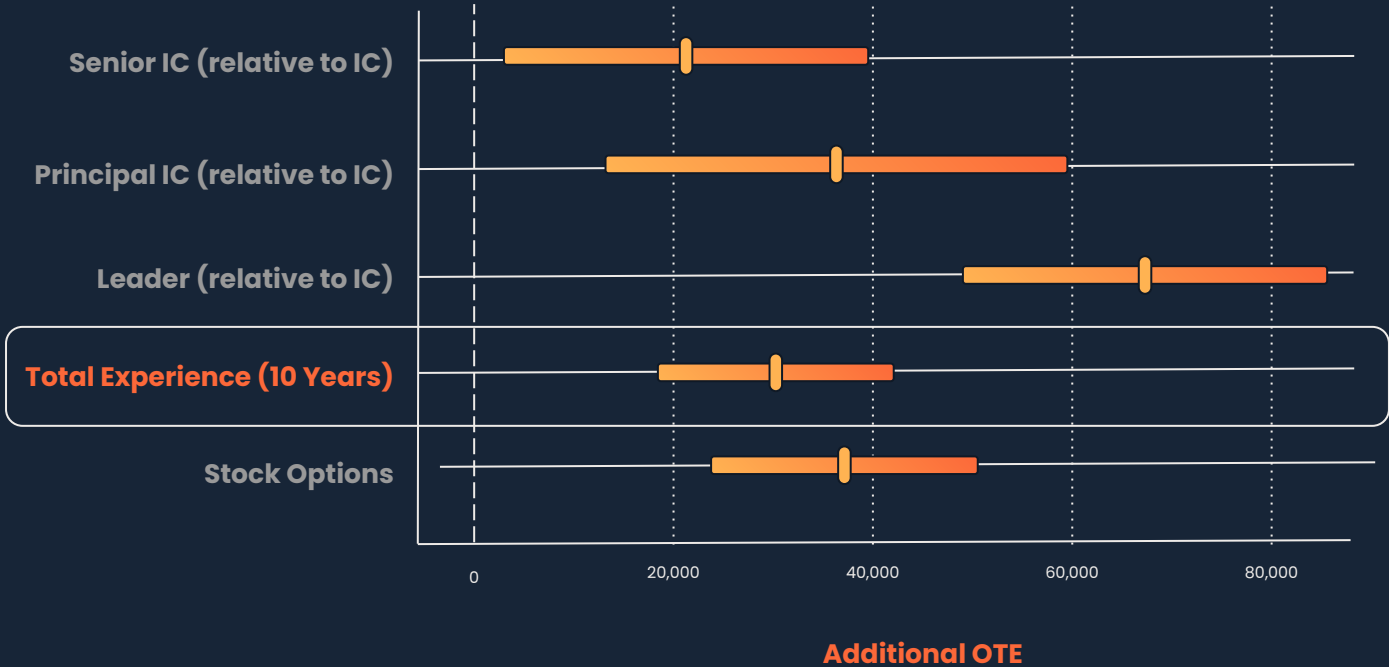


COMPENSATION

OTE by Rank (Cont.)

Experience still pays off, regardless of rank.

When comparing two individuals with similar characteristics, every additional year of experience is estimated to increase annual earnings by about \$3,000 or \$30,000 over 10 years.

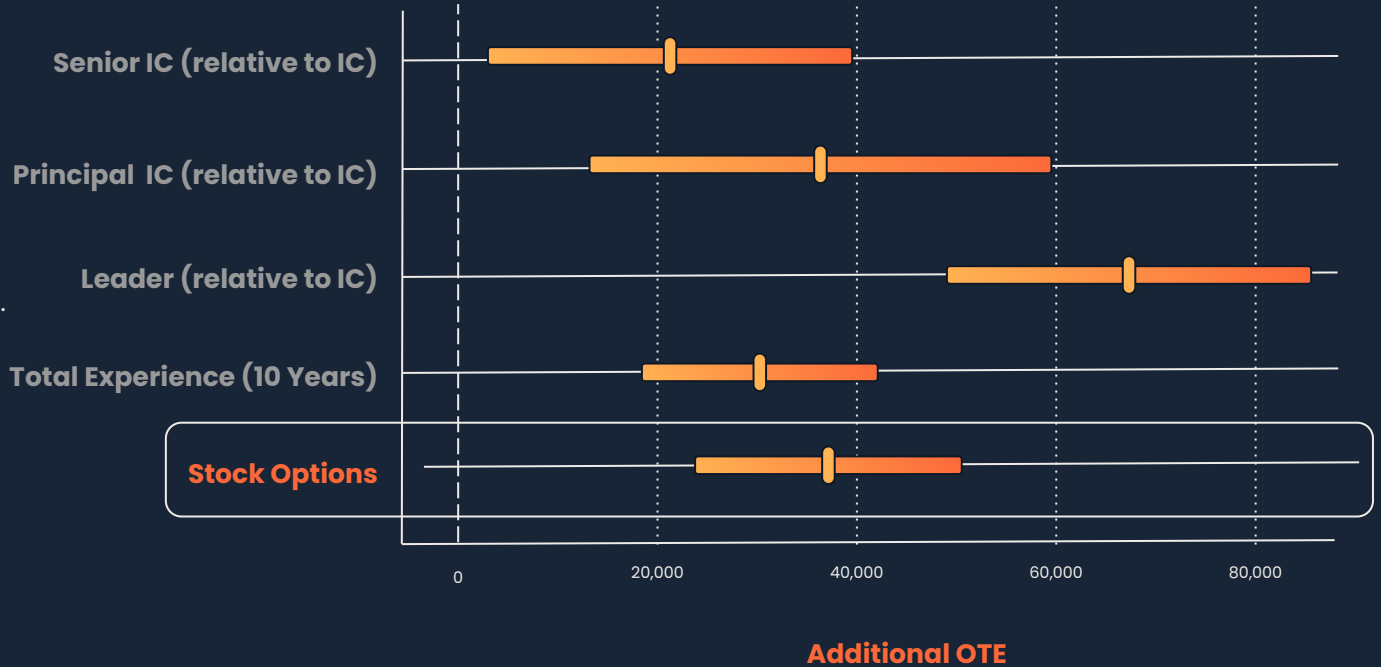


COMPENSATION

OTE by Stock Options

Ownership in stock options augments OTE.

Respondents with stock options are likely to report higher OTE compared to those without them, suggesting that equity compensation is an important factor in overall earnings, holding other factors constant.



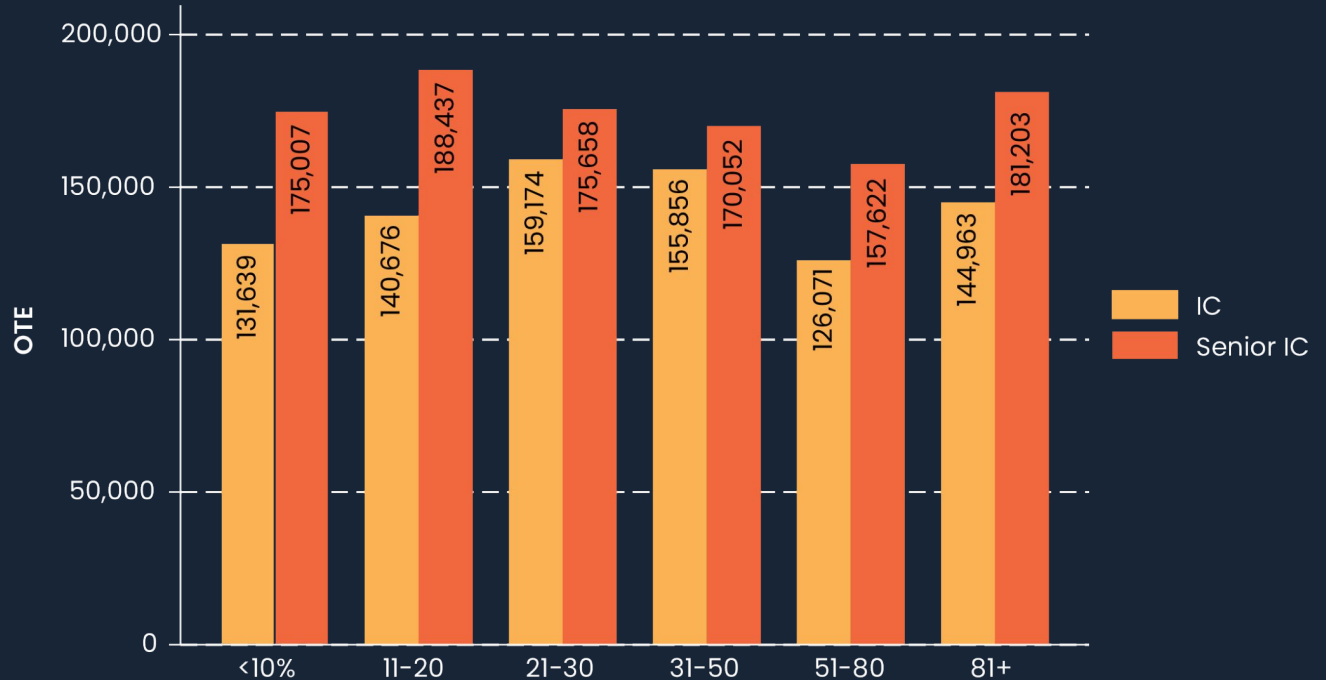
COMPENSATION

OTE by Time Spent as Specialist

OTE is not correlated with % of time spent as a specialist.

OTE shows no correlation with the percentage of time spent in a specialist role. While a significant link exists between the proportion of time dedicated as a specialist and the number of products supported, this does not translate to higher earnings.

Average On Target Earnings by % Time Spent as a Specialist



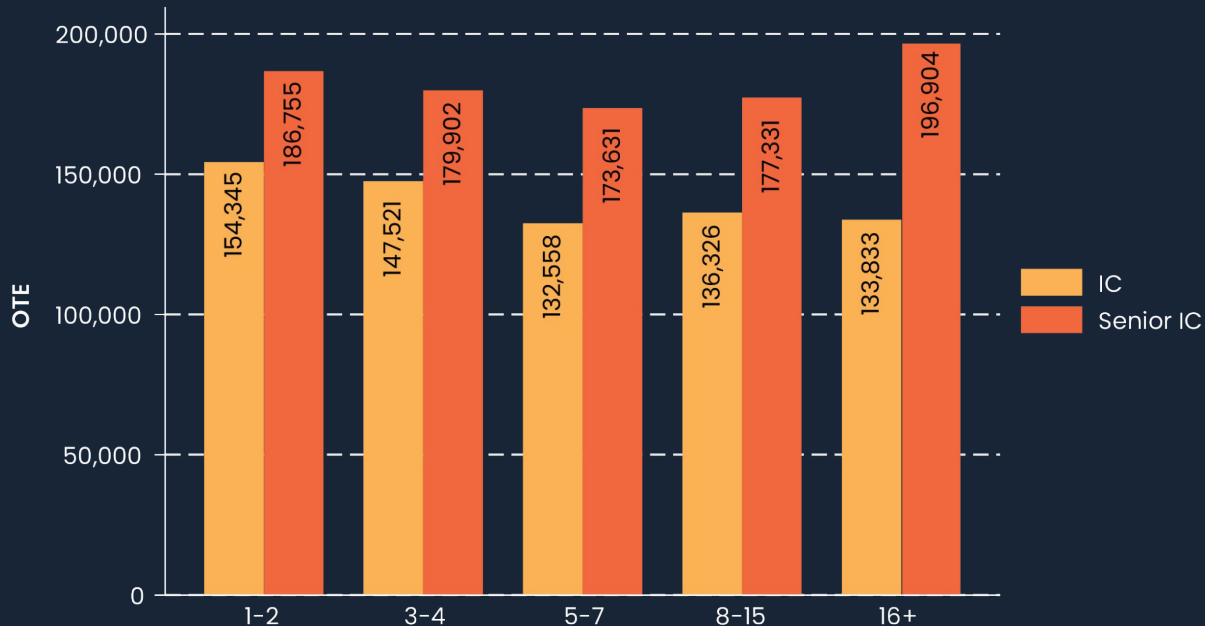
COMPENSATION

OTE by Time Spent as Specialist (cont.)

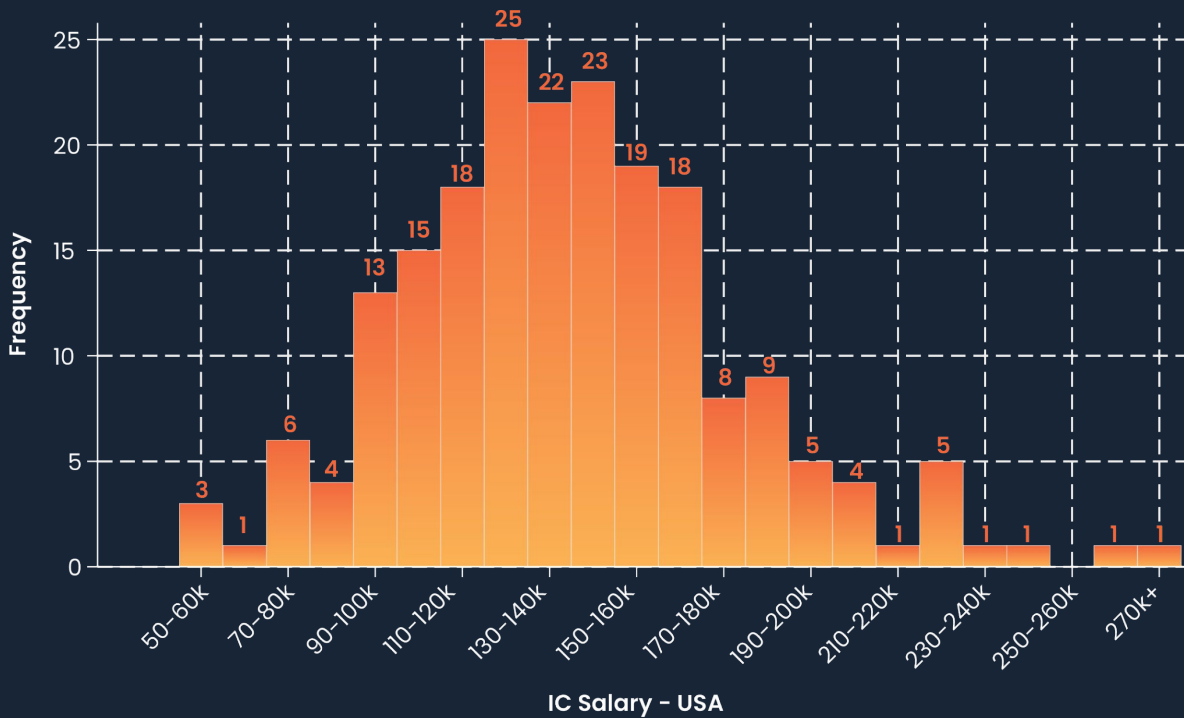
OTE is not correlated with specialization.

While specialization (measured in percentage of time spent as a specialist) is correlated with the number of products supported, neither are correlated with OTE. In other words, you do not need to be hyper-specialized to increase earnings.

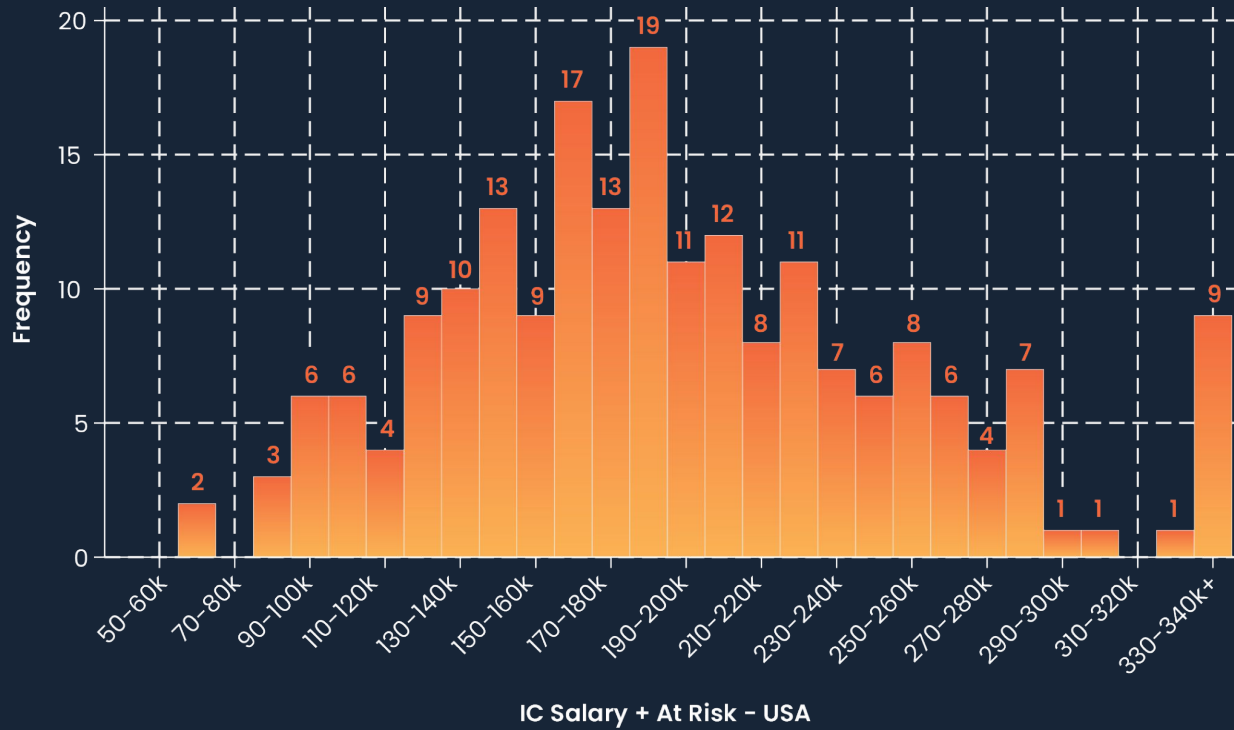
Average On Target Earnings by Products Supported



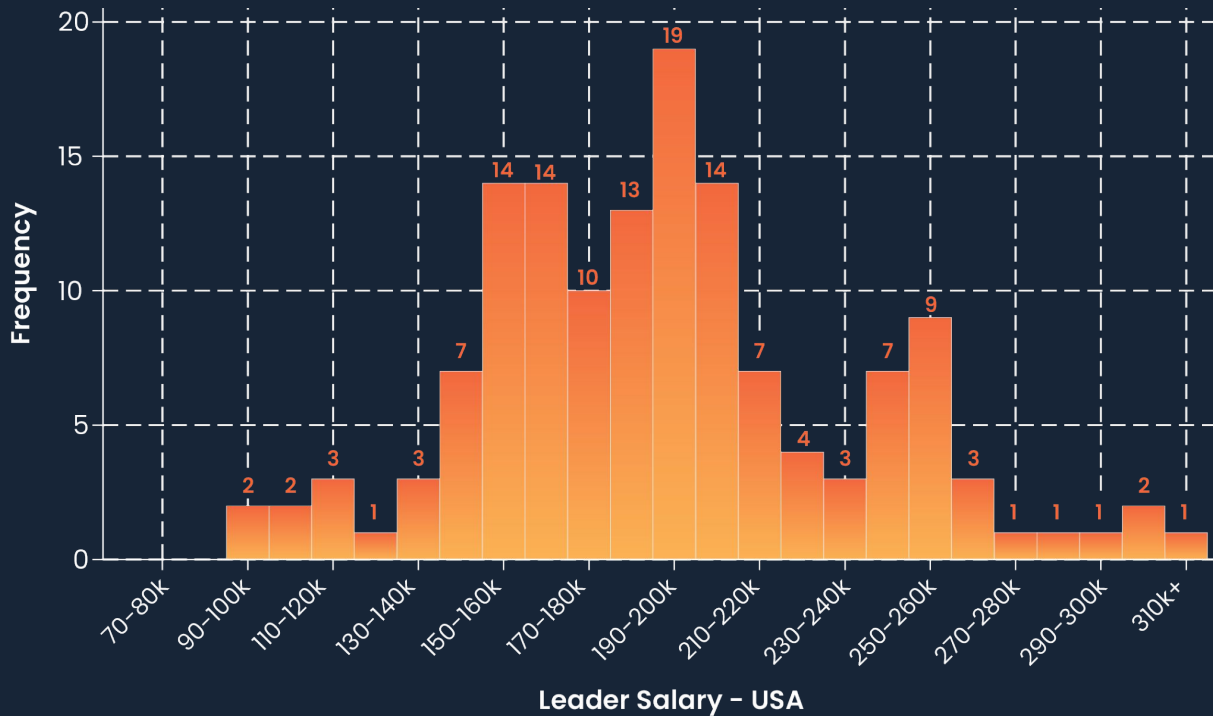
Compensation by Region: USA - IC Base Salary



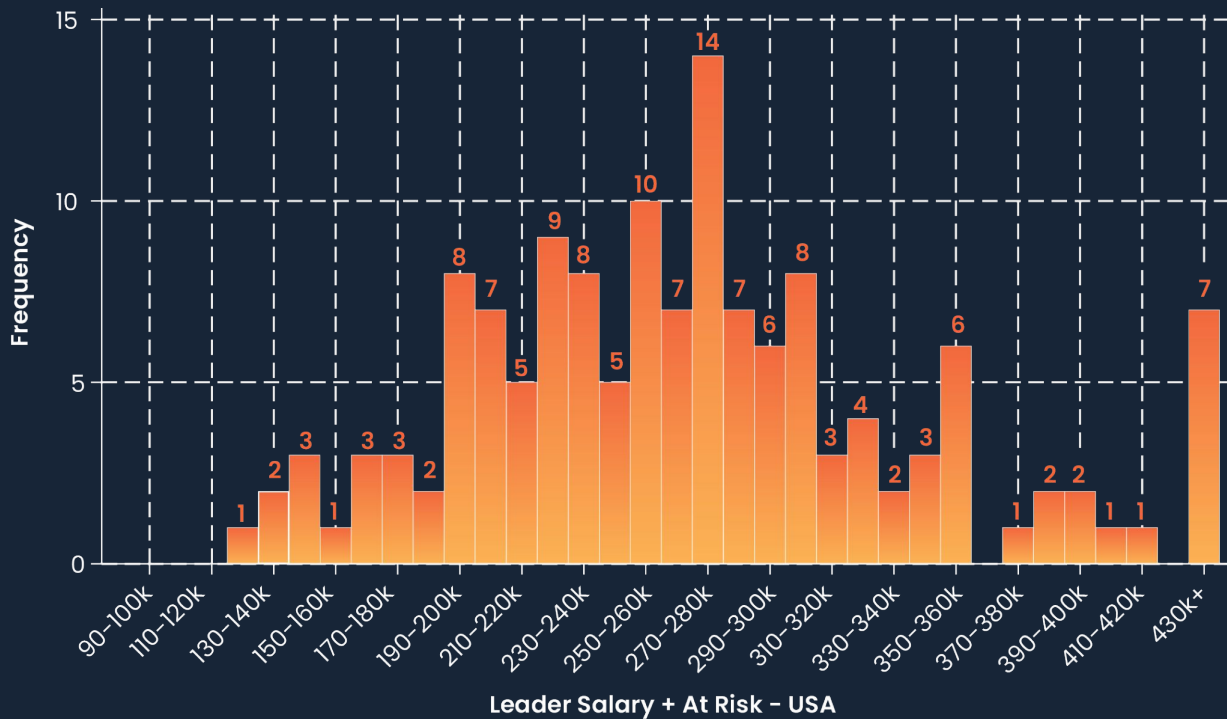
Compensation by Region: USA - IC OTE



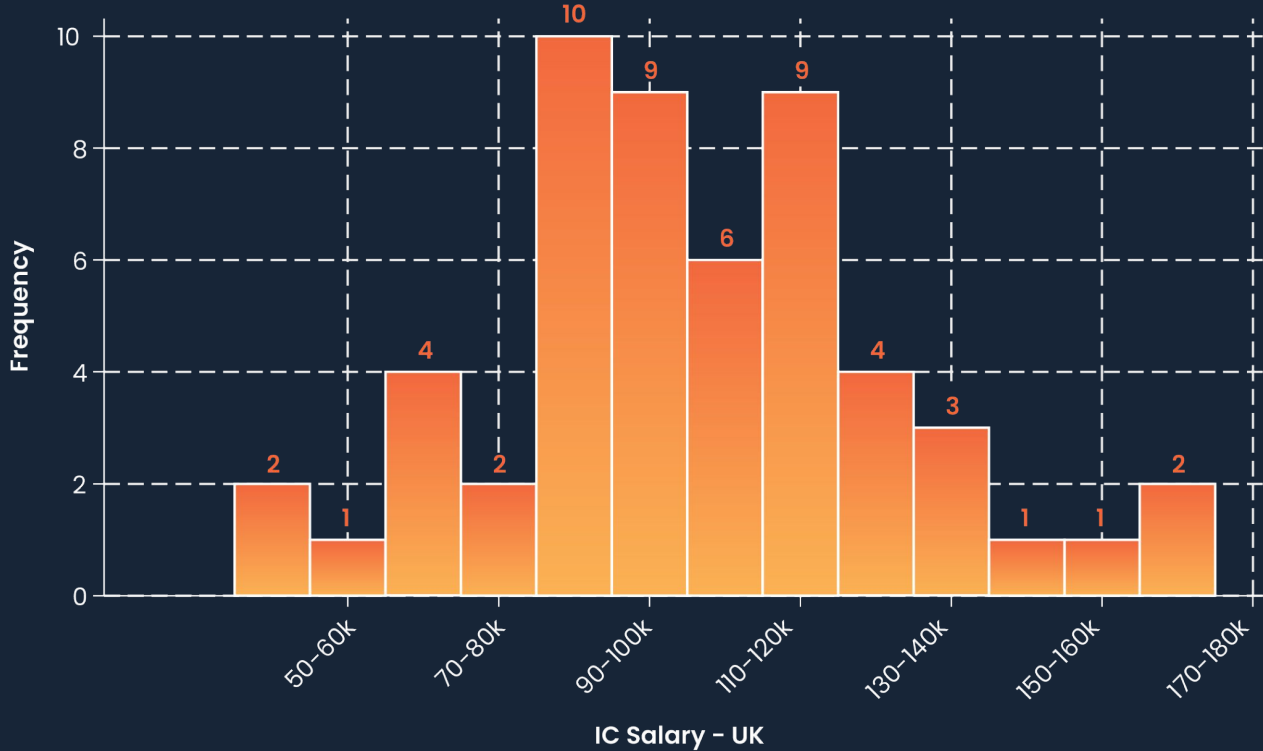
Compensation by Region: USA - Leader Base Salary



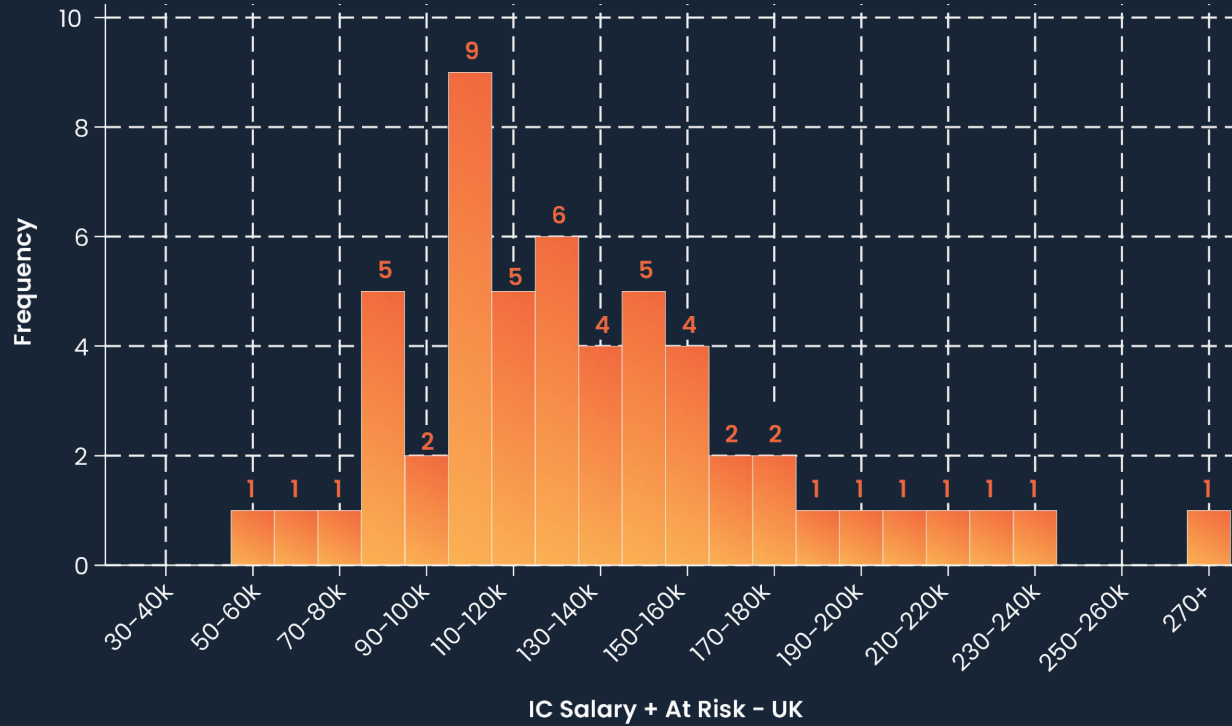
Compensation by Region: USA - Leader OTE



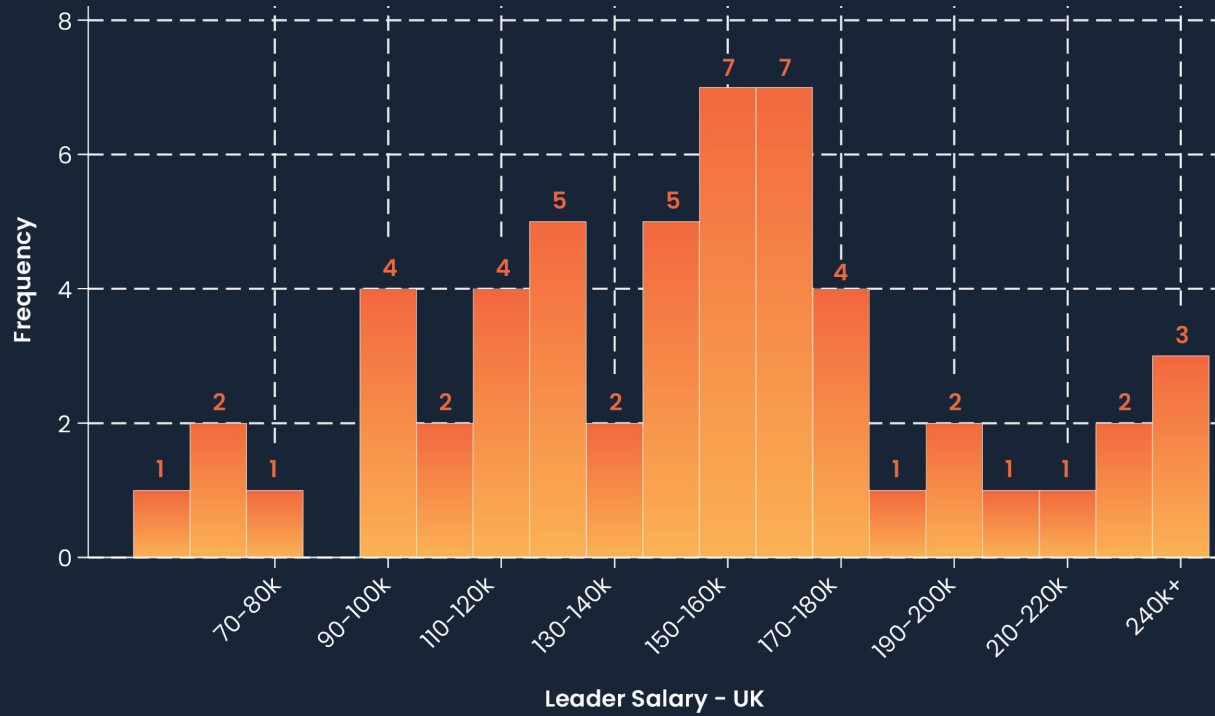
Compensation by Region: UK IC Base Salary 🇬🇧



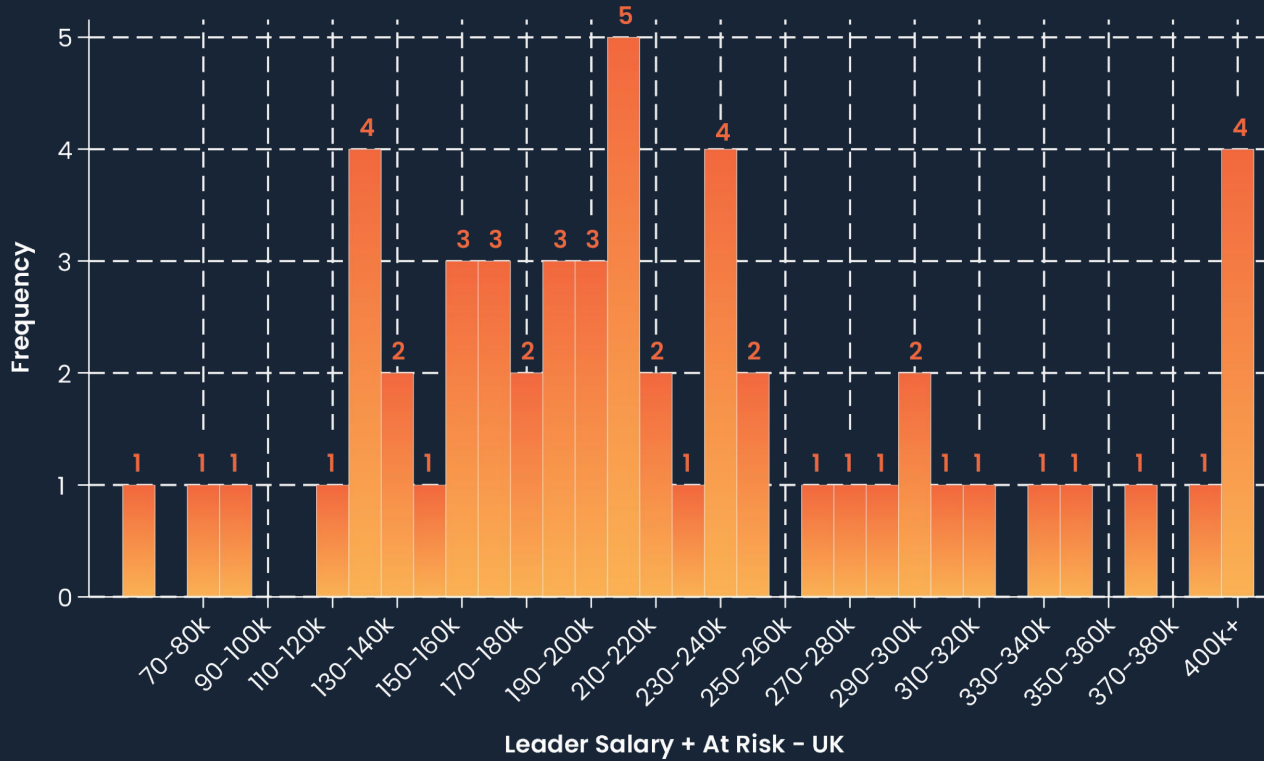
Compensation by Region: UK IC OTE



Compensation by Region: UK Leader Base Salary

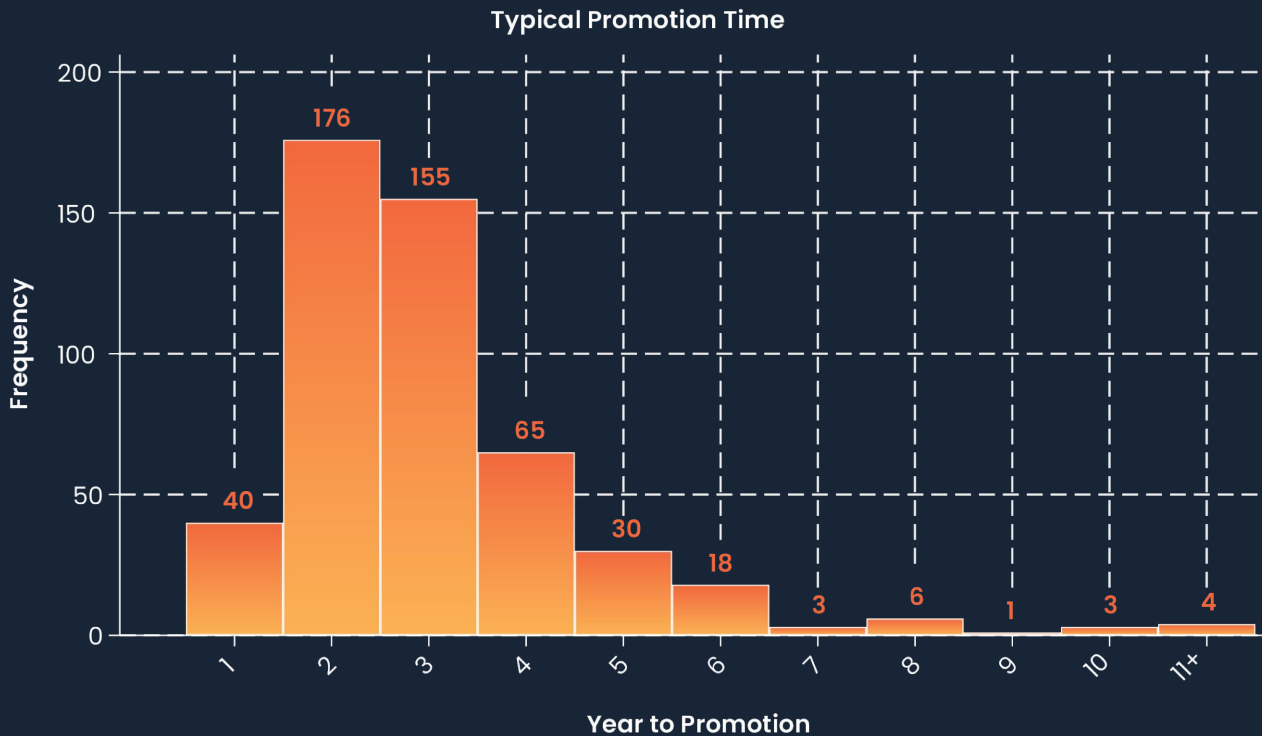


Compensation by Region: UK –Leader OTE



Advancement

Both ICs and Leaders typically receive promotions around their third year. Beyond compensation, advancement opportunities — or the lack thereof — may significantly impact employee satisfaction and retention.

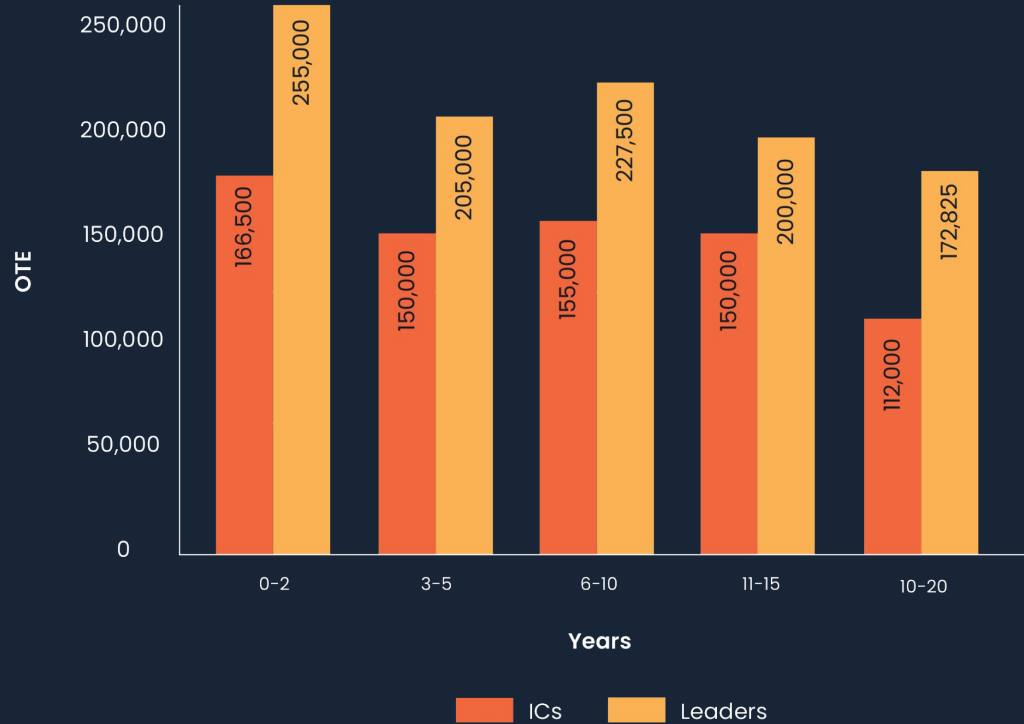


Searching for Greener Pastures

Taking into account **overall work experience** and **time spent in their current positions**, there are indications that both ICs and Leaders seek new job opportunities to increase their income.

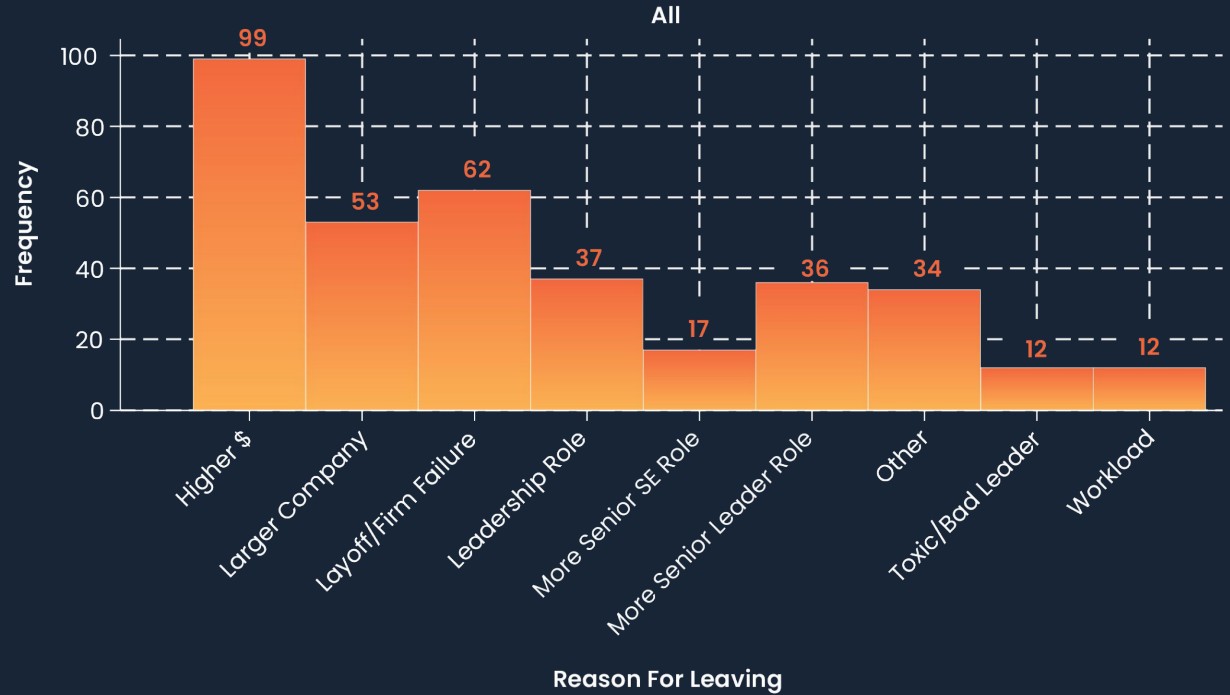
Having more total experience generally leads to higher pay, and the trend of individuals with less time in their roles earning more suggests that ICs and Leaders are likely getting better pay offers when they move to new companies.

Median On Target Earnings by Time at Current Organization



Searching for Greener Pastures (Cont.)

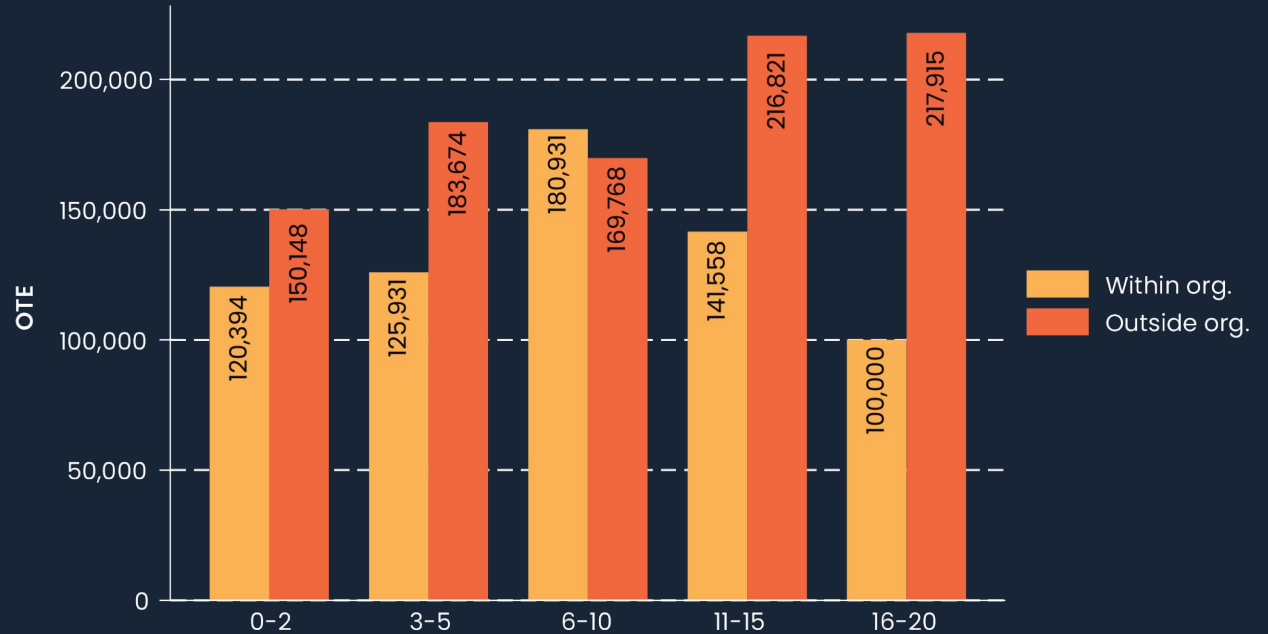
The pattern of searching for greener pastures is supported by the most common reason for leaving previous jobs: the pursuit of higher pay. The decision to switch jobs for a position at a larger company, or to step into a leadership or more advanced role, is also associated with receiving higher salaries.



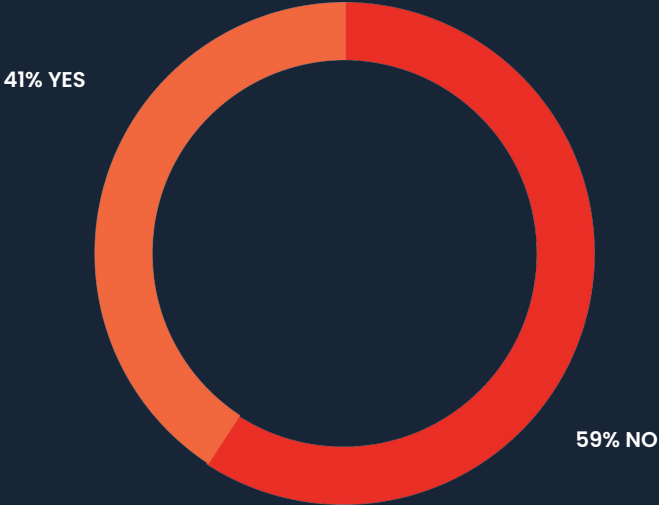
Searching for Greener Pastures (Cont.)

Joining new organizations, particularly for ICs, typically results in higher starting salaries. They're also more likely to be recruited from outside the organization.

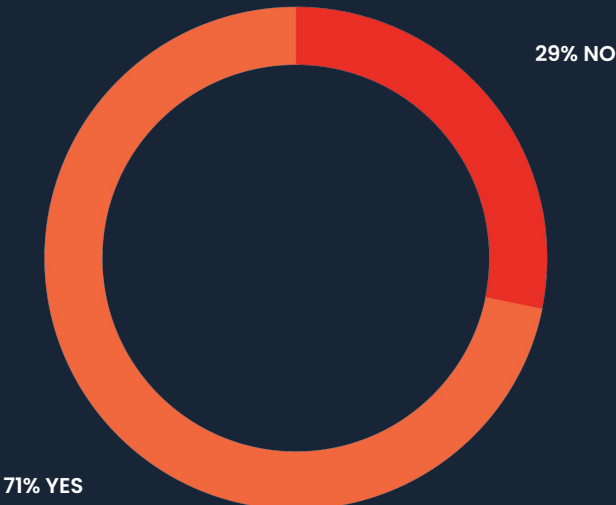
Average On Target Earnings (ICs) by Total Years of Experience



Hired from Outside Your Organization: Leaders



Hired from Outside Your Organization: ICs



● Yes
● No



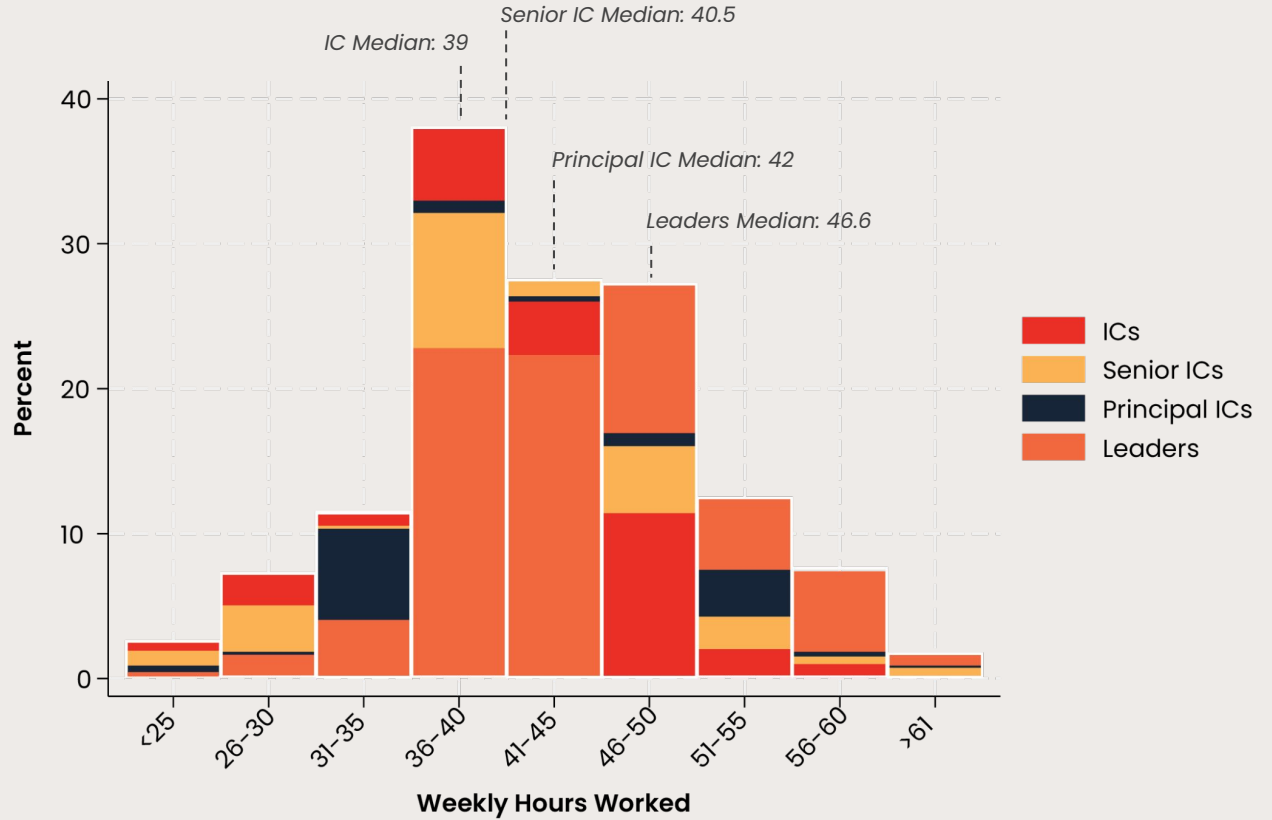
Workload

Workload

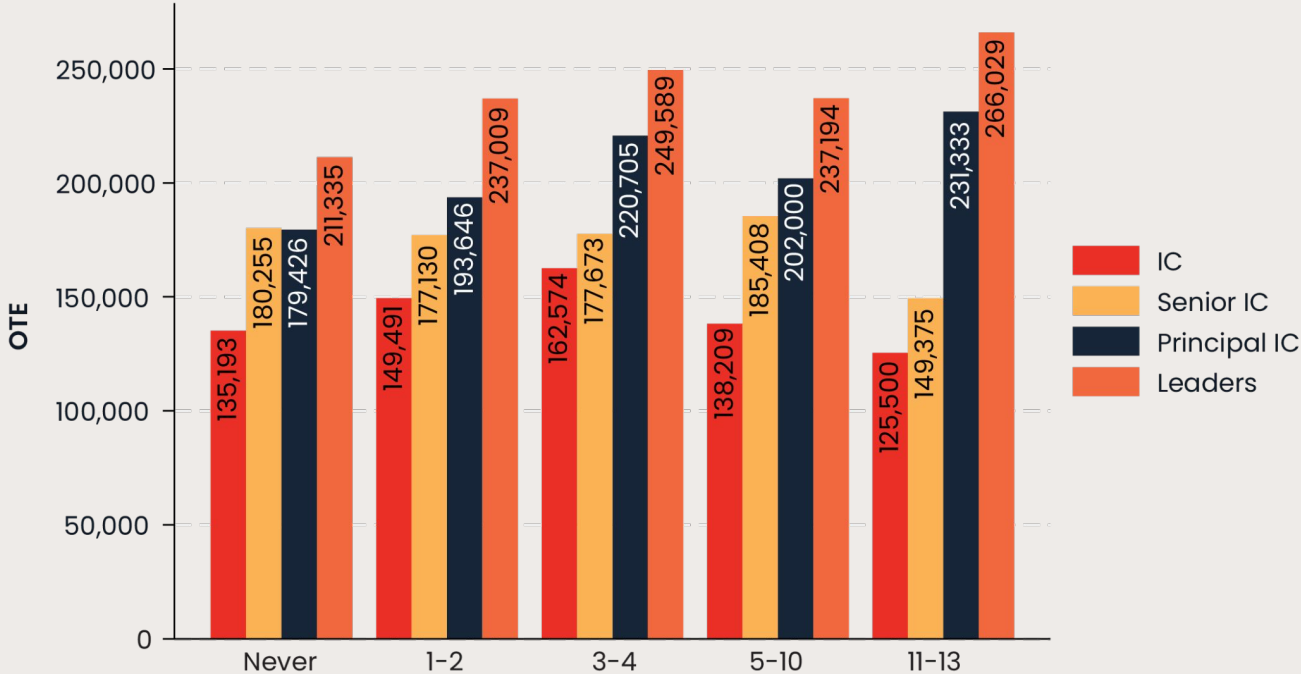
Presales Work Week

Workloads have remained constant, yet more experienced and senior respondents continue working long hours.

The trend shows that long hours remain a common aspect of leadership roles, with the average Leader typically working 46.6 hours weekly. This is, on average, six hours more per week compared to ICs, confirming that higher seniority and experience levels correlate with longer working hours.



Average On Target Earnings by Weeks over 55 hrs



Workload

Presales Crunch Week

Longer hours are linked to higher earnings, especially for senior roles. The relationship between extended working hours and OTE is more pronounced among senior positions, including Leaders and Principal ICs.

Crunch weeks = Weeks worked over 55 hours in a three-month period

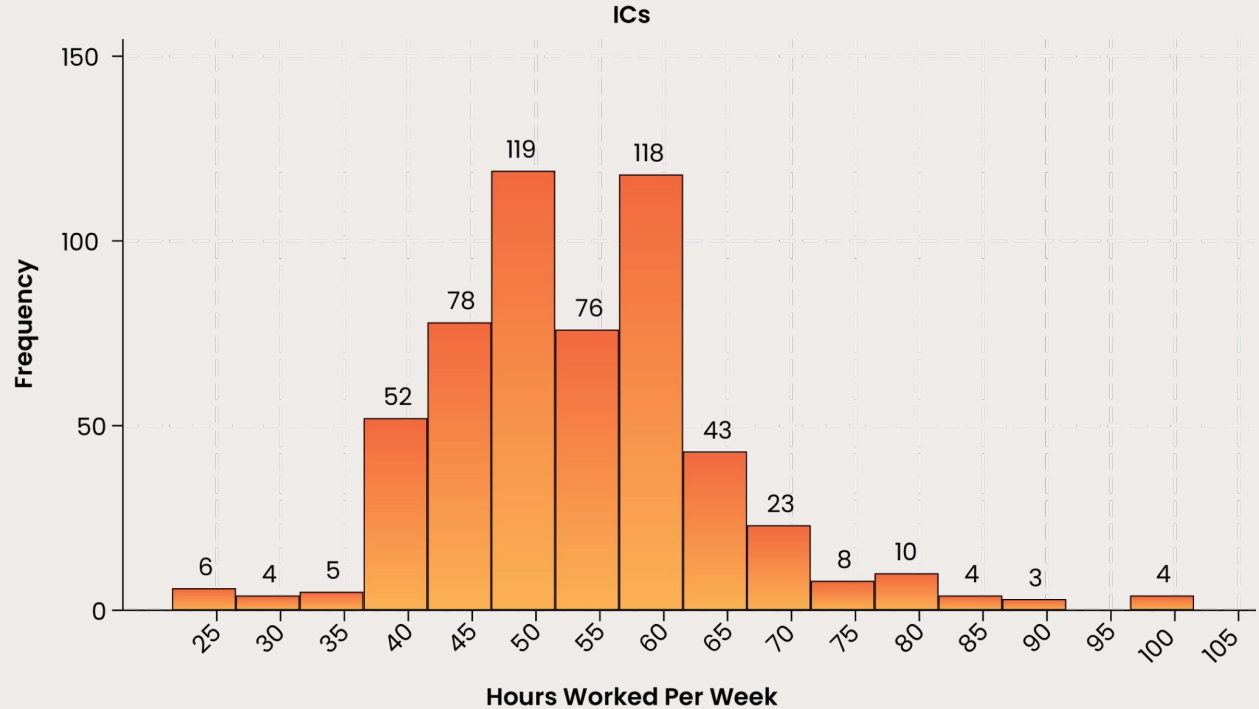
Workload

Presales Crunch Week (Cont.)

Consistent crunch weeks for ICs, increase for Leaders.

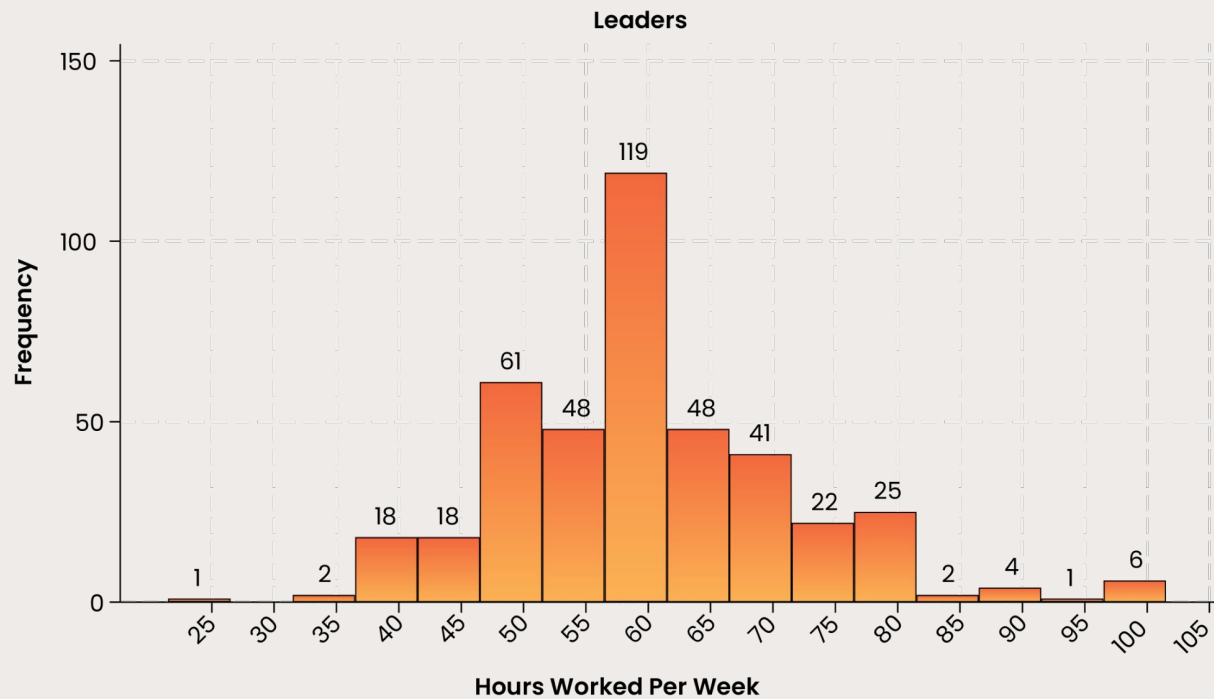
ICs have reported a consistent amount of crunch weeks this year compared to 2023, typically working one to two weeks with over 55 hours within a three-month period. On the other hand, Leaders have noted an uptick in their longer work weeks, with the average rising from 2.5 to 3.6 crunch weeks in the same period.

The pattern continues for maximum hours worked. The typical IC is maintaining the same workload as last year, averaging about 54 hours per week. However, Leaders have experienced a slight increase, working on average one additional hour more each week.



Workload

Presales Crunch Week (Cont.)



Workload

Presales Activities: Misallocation

Misallocation refers to the imbalance in how Leaders and ICs allocate their time versus where they believe it would be best spent. This discrepancy is measured by comparing the ranking of activities based on time dedication to their perceived impact.

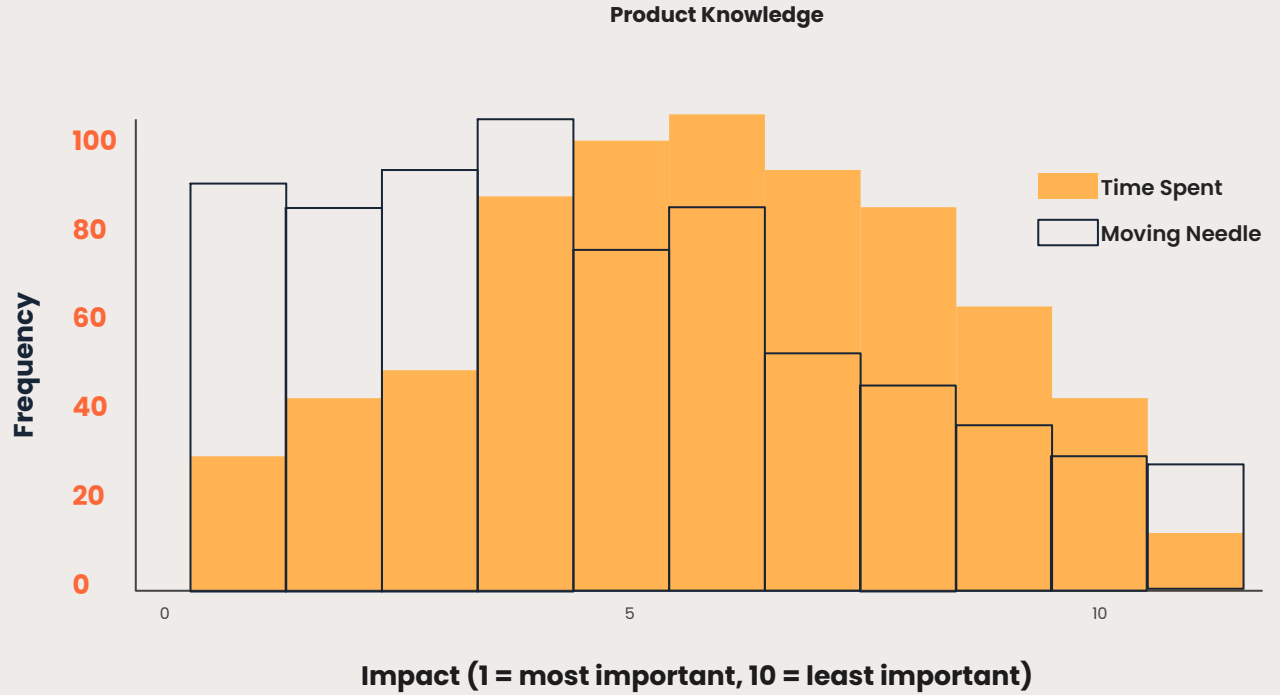
*Note: Consensus customers routinely have lower misallocations.

TECH DEMOS	DISCOVERY	1
DISCOVERY	PROD KNOW IMP	7
INTRO DEMOS	TECH DEMOS	-2
POCS	PLAN ARC	2
RFPS	POCS	-1
PLAN ARC	CONSULTING CALLS	1
CONSULTING CALLS	IMP PRESALES	4
PROSPECT SUPPORT	PROSPECT SUPPORT	0
PROD KNOW IMP	INTRO DEMOS	-6
OTHER	RFPS	-5
IMP PRESALES	OTHER	1

Workload

**Presales Activities:
Misallocation (Cont.)**

Product Knowledge is a Presales activity with a significant gap, indicating a desire among ICs to devote more time to enhancing their understanding of the product.

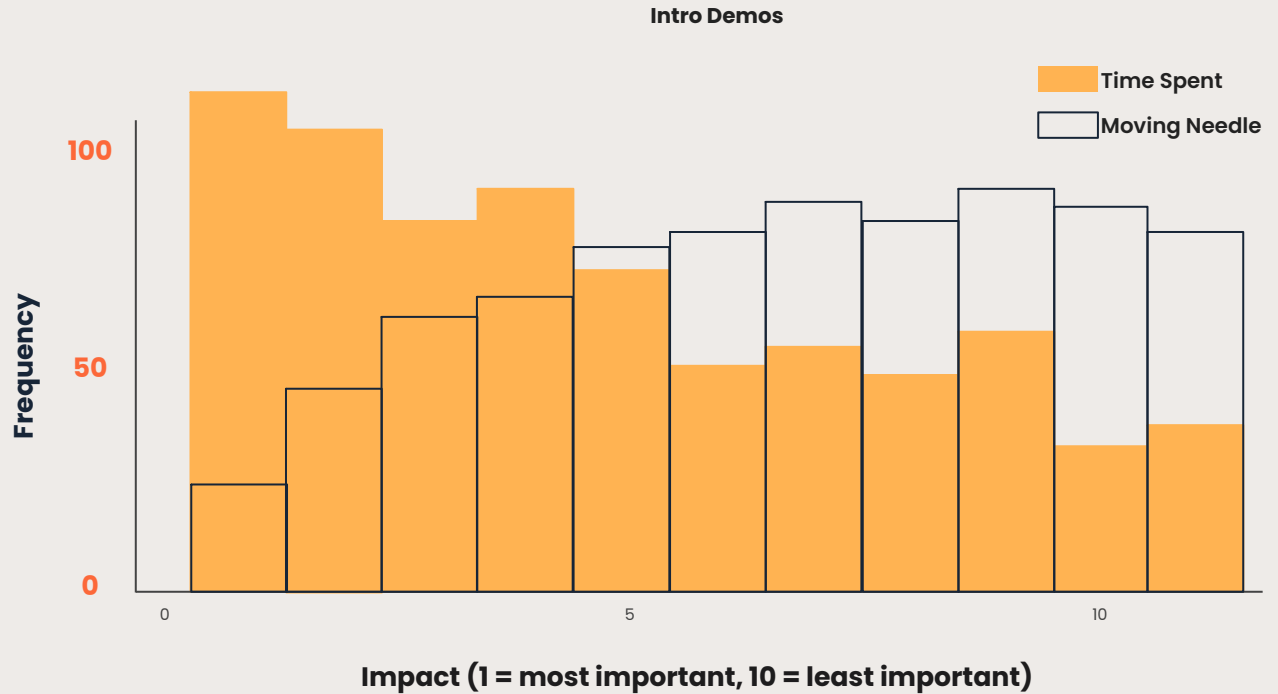


Workload

Presales Activities: Misallocation (Cont.)

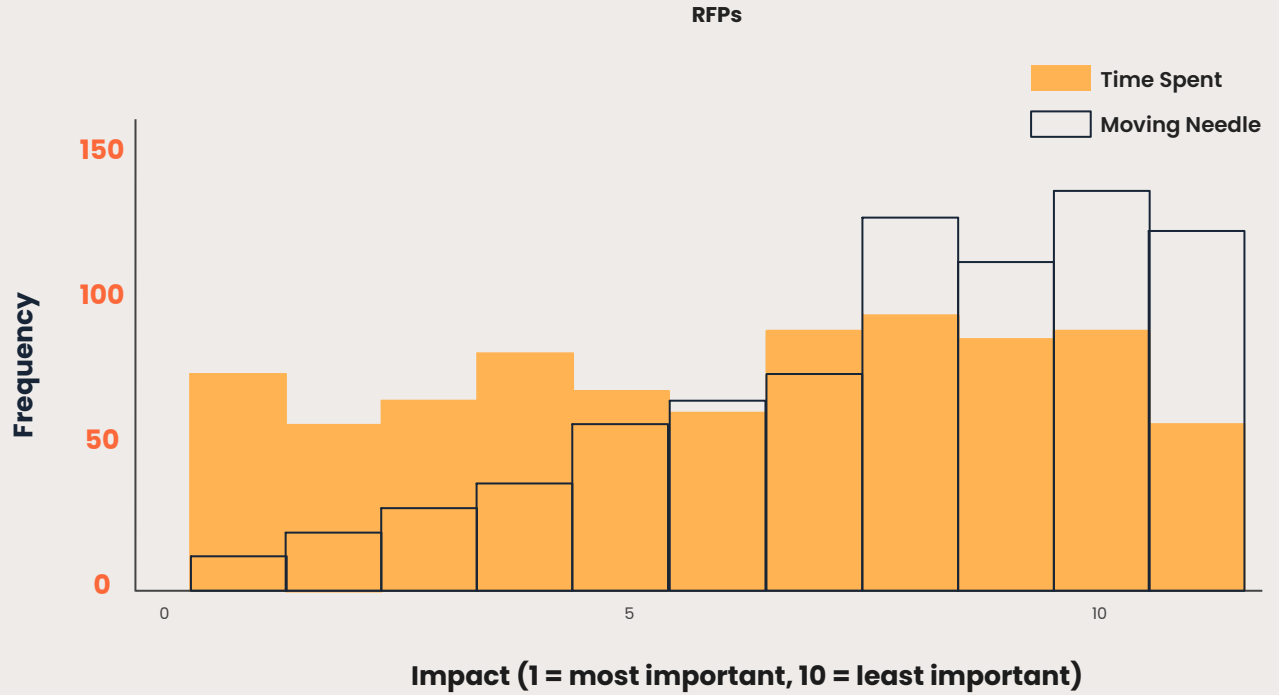
Like last year, the inverse is true for Intro Demos and RFPs — both consume more time than respondents feel is warranted. Intro Demos exhibit the greatest disparity, being the second most time-consuming activity but only 10th in perceived impact. ICs also report spending more time doing RFPs than Leaders think they do.

This data suggests that Intro Demos and RFPs are prime candidates for automation.



Workload

**Presales Activities:
Misallocation (Cont.)**



Workload

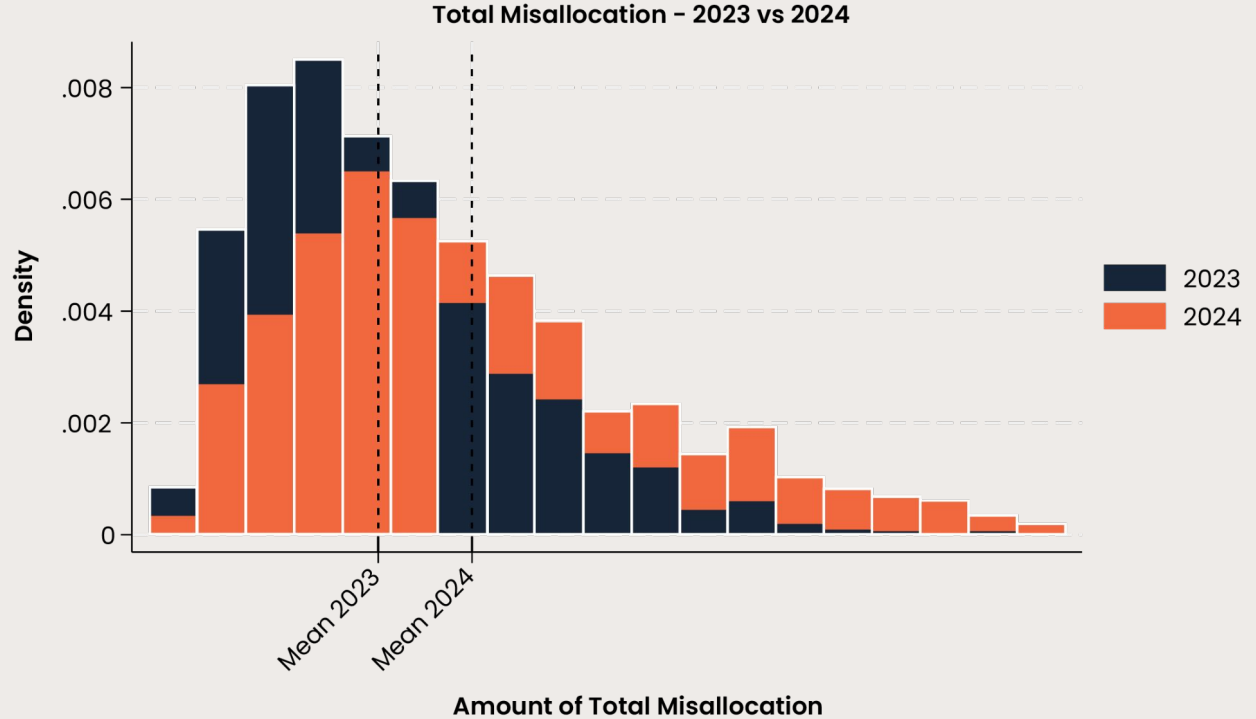
Total Misallocation

Misallocation is worsening YoY.

Despite SEs dedicating more time to high-impact activities like Discovery, misallocation has worsened from 2023 to 2024, indicating that even targeted efforts have yet to fully optimize the balance of task prioritization across Presales functions.

Over 50% of this increase in misallocation is driven by greater misallocations in Intro Demos, RFPs, and Discovery.

The misallocation of presales resources places strain on the entire buyer's journey. Teams from marketing to sales to customer success all have a need to simplify activities the buying process and scale product expertise across the funnel.



Workload

Presales Activities: Moving the Needle

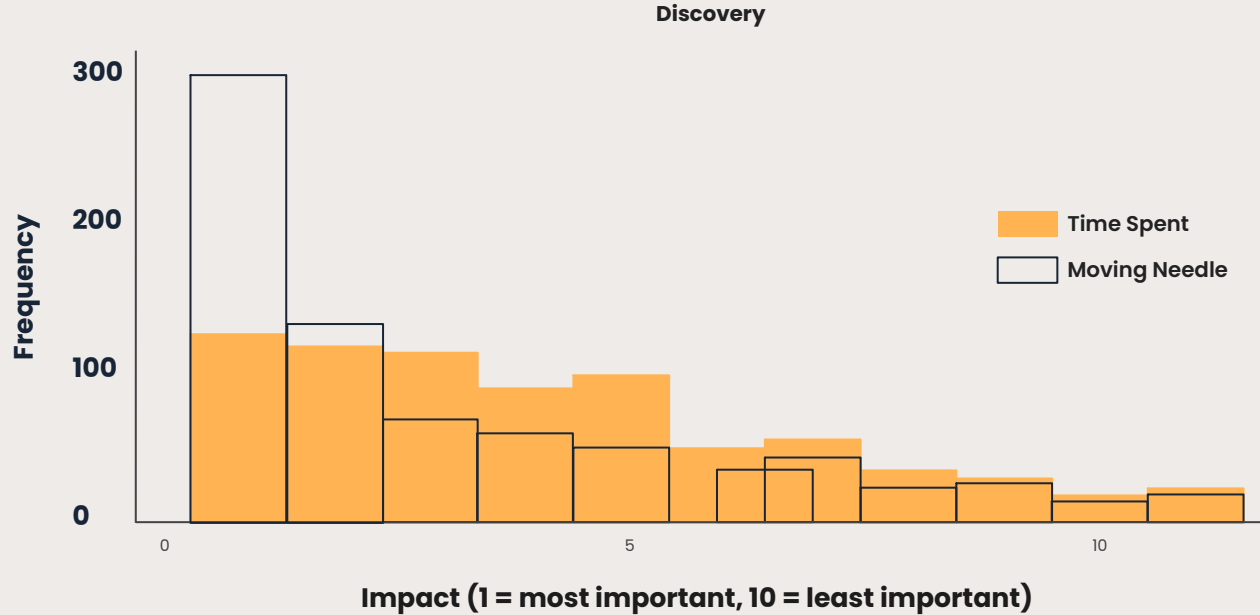
Discovery is the No. 1 Presales activity that moves the needle — ICs are also spending more time on it.

This year's data reveals that respondents would like to dedicate more time to Discovery; a substantial number of respondents say it's the most important thing for driving results. Almost all participants rate it within their top three impactful activities.

The prioritization of Discovery within the Presales process varies among professionals, with several trends emerging on who ranks the need for Discovery first:

- More senior, higher-ranked respondents
- Those with more stakeholders to close
- ICs with a team-only quota

*Note: Consensus customers report lower average Discover misallocation, indicating they're spending their discovery time more efficiently

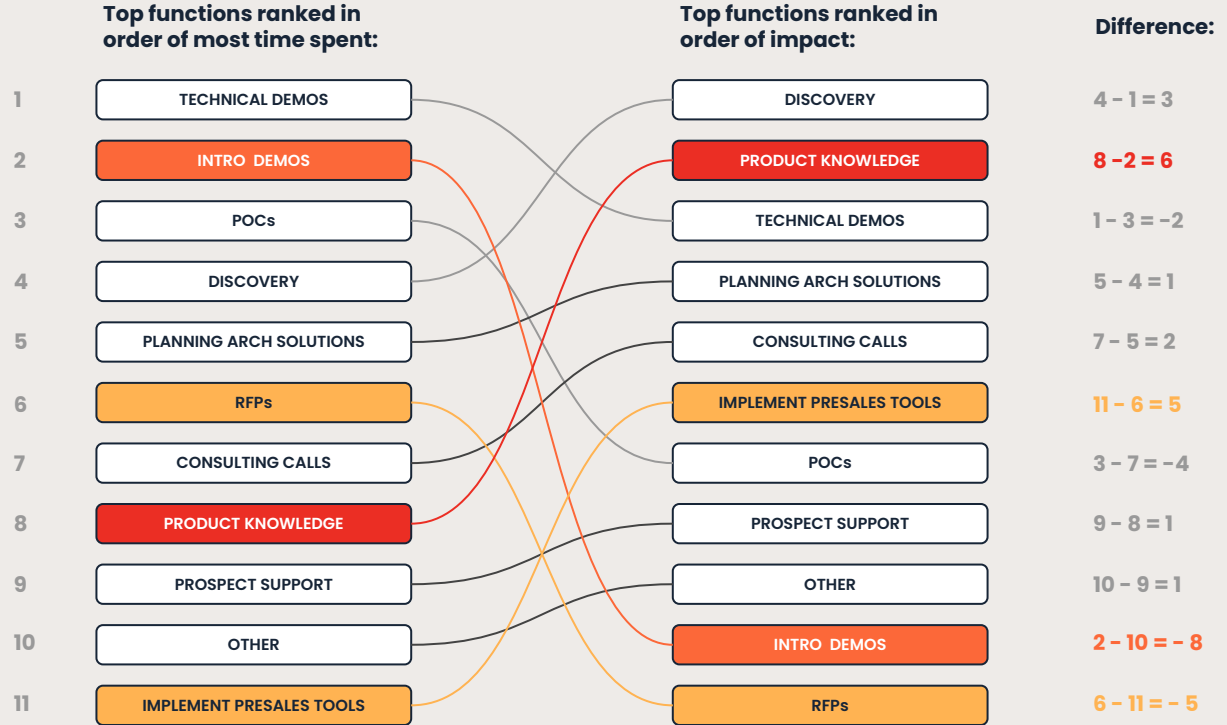


Workload

Presales Activities: Moving the Needle

POCs are rising in significance.

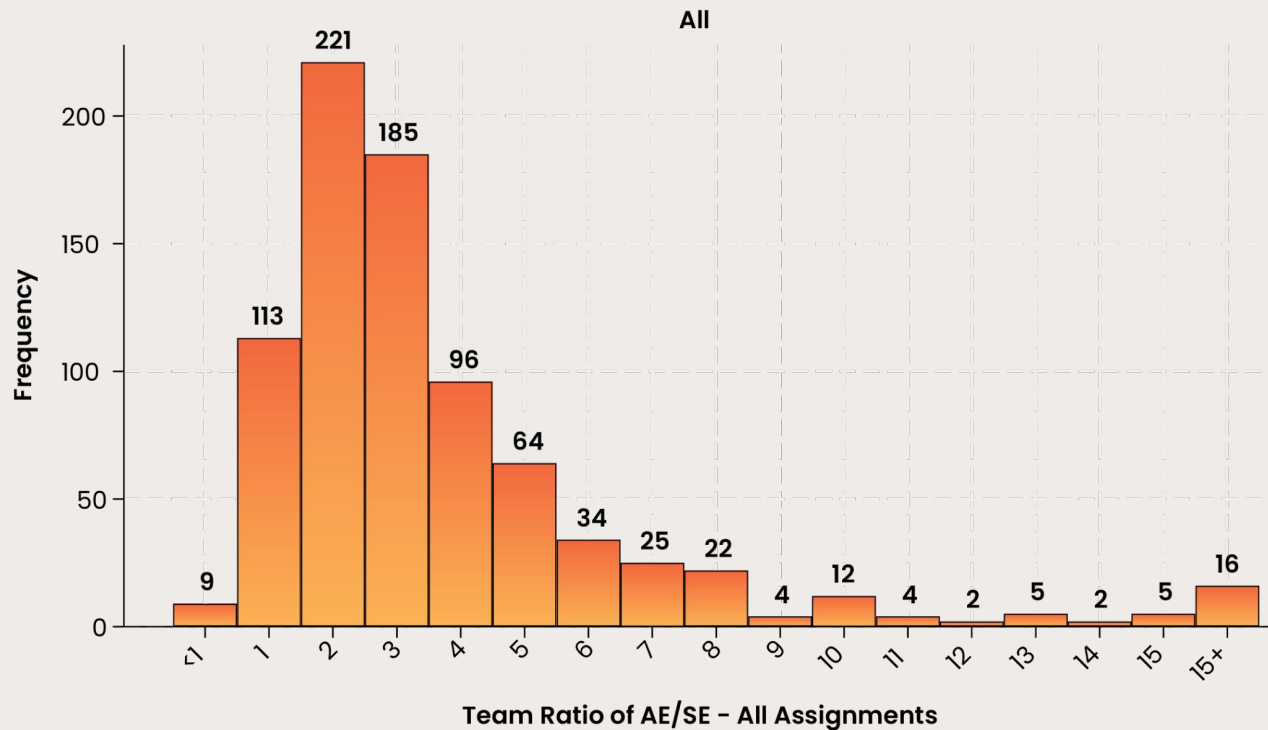
POCs have climbed in their ranking since 2023 due to their impact on moving the needle. In particular, Leaders view POCs as being more valuable to driving outcomes compared to ICs.



Workload

AE:SE Ratio

The average ratio of AEs to SEs has stayed steady at approximately 4:1 from last year, showing AE:SE uniformity across different assignments and roles. The consistency suggests that a limit of 3-4:1 is likely the maximum sustainable AE:SE ratio, influenced more by the nature of the product than the assignment type.



Workload

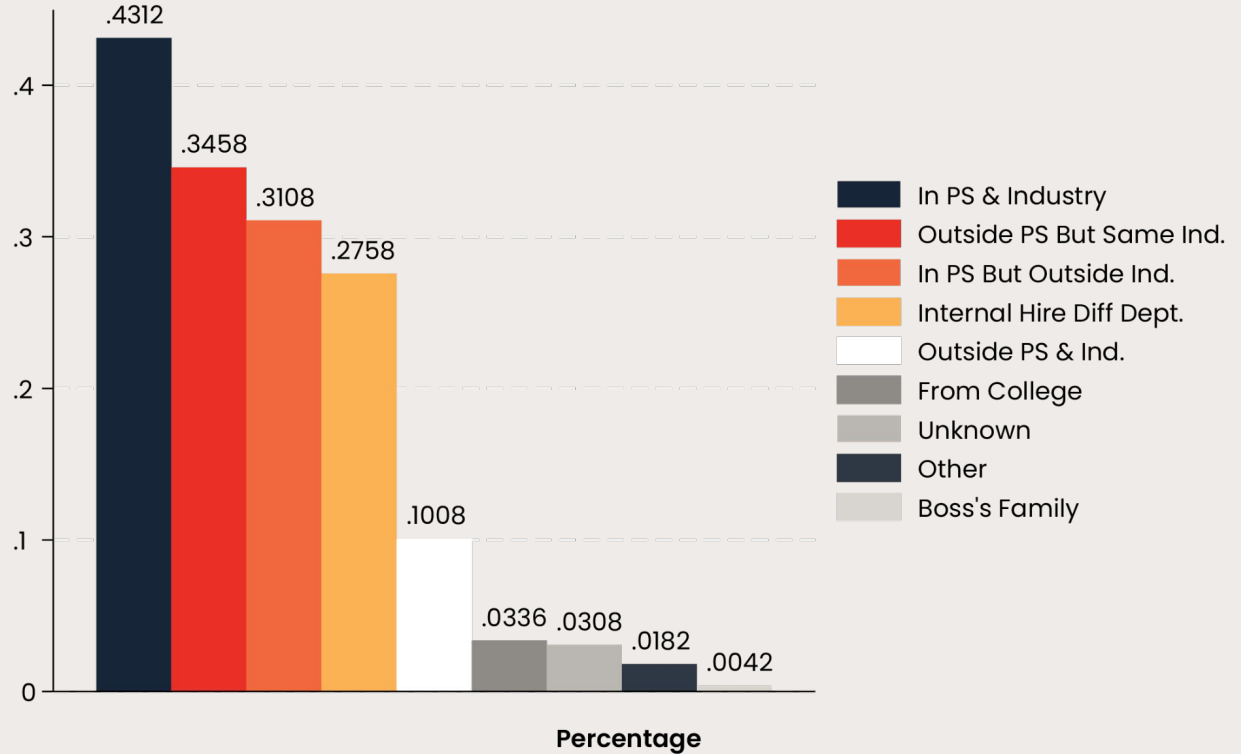
Hiring ICs

Organizations prefer hiring new ICs who have prior experience within the industry, even if their background is not directly in Presales.

This preference underscores the importance of industry acumen as a key asset in the Presales domain, despite a potential learning curve in transitioning to Presales functions.

*Note: Respondents could select multiple options.

From where did you hire your last ICs?

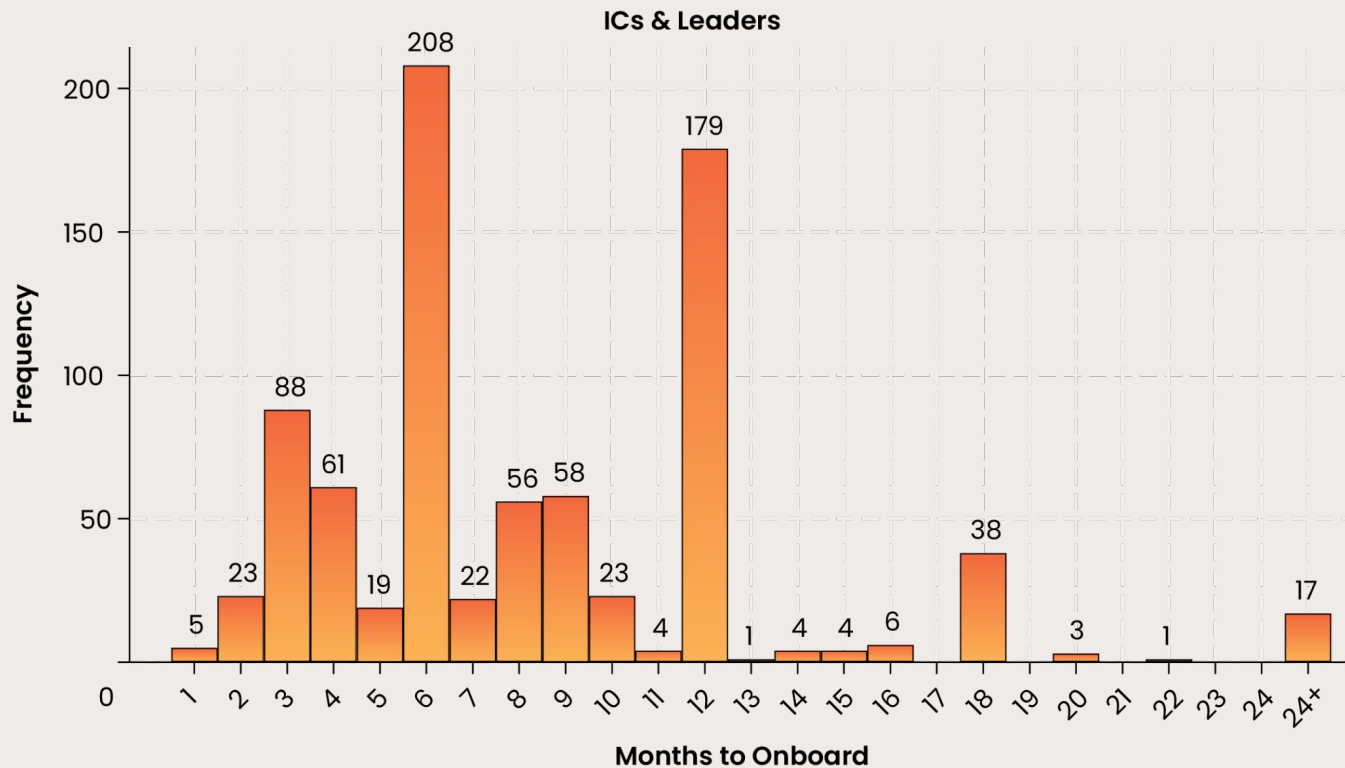


Workload

SE Onboarding Time

Onboarding times have increased for both Leaders and ICs.

For the second year in a row, Leaders and ICs are experiencing longer onboarding periods, with the average duration increasing nearly two months over the past year. This year's average onboarding time has risen to 8.3 months, up from last year's 6.7 months.



Workload

IC Onboarding Time (Cont.)

All of the factors that were associated with longer onboard times in last year's report are still relevant this year, including:

- Higher AE:SE ratios
- Longer and more frequent product demonstrations
- A greater number of products supported
- Larger firm sizes
- Longer tenures

Interestingly, a higher frequency of demos performed weekly correlates with shorter onboarding times, suggesting that more active engagement in practical tasks may expedite the onboarding process.

Time at Current Role
(1 Year)

AE/SE Ratio

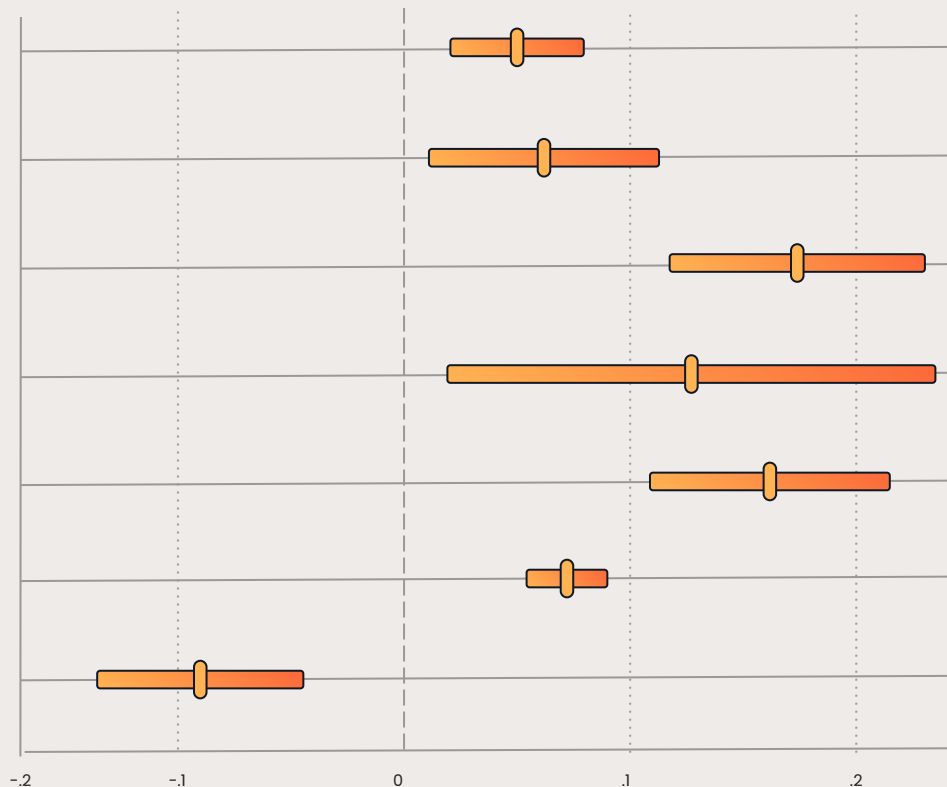
Man Hours per Demo

Demos per Close

Firm Employees
(1,000)

Products Supported

Demos Weekly
(1 per week)



Additional Time to Onboard (Measured in (1/10) of a month)

Workload

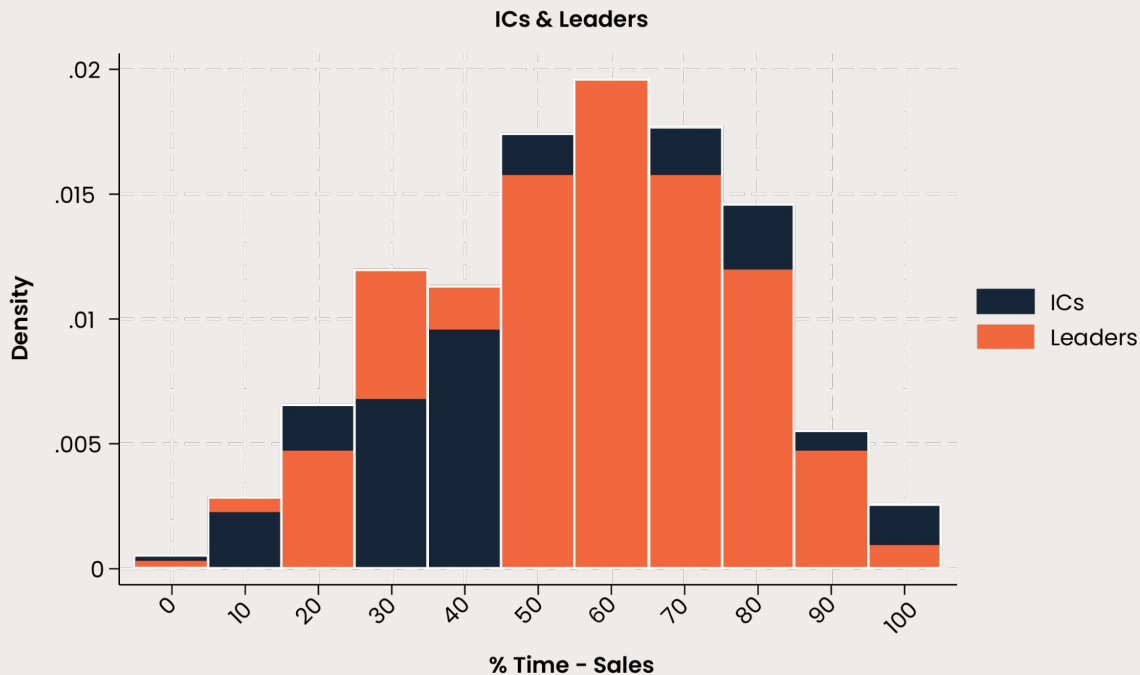
Supporting Different Revenue Functions: Sales

Less than 2% of SEs support sales exclusively, and SEs are taking on more diverse responsibilities.

Compared to 2023, time dedicated to Sales appears to be falling by 4.2 percentage points. However, when it comes to supporting different revenue functions, Sales still take up a majority of ICs' and Leaders' time:

- Sales: 54% (average time spent)
- Client success: 12%
- Marketing: 8% steady
- Business development: 8%
- Product development 7%
- Channel: 6%
- Other: 3%

Overall, ICs report spending more time with Sales than Leaders do. This shows a need to bring product knowledge and expertise to the entire revenue team, not just sales.



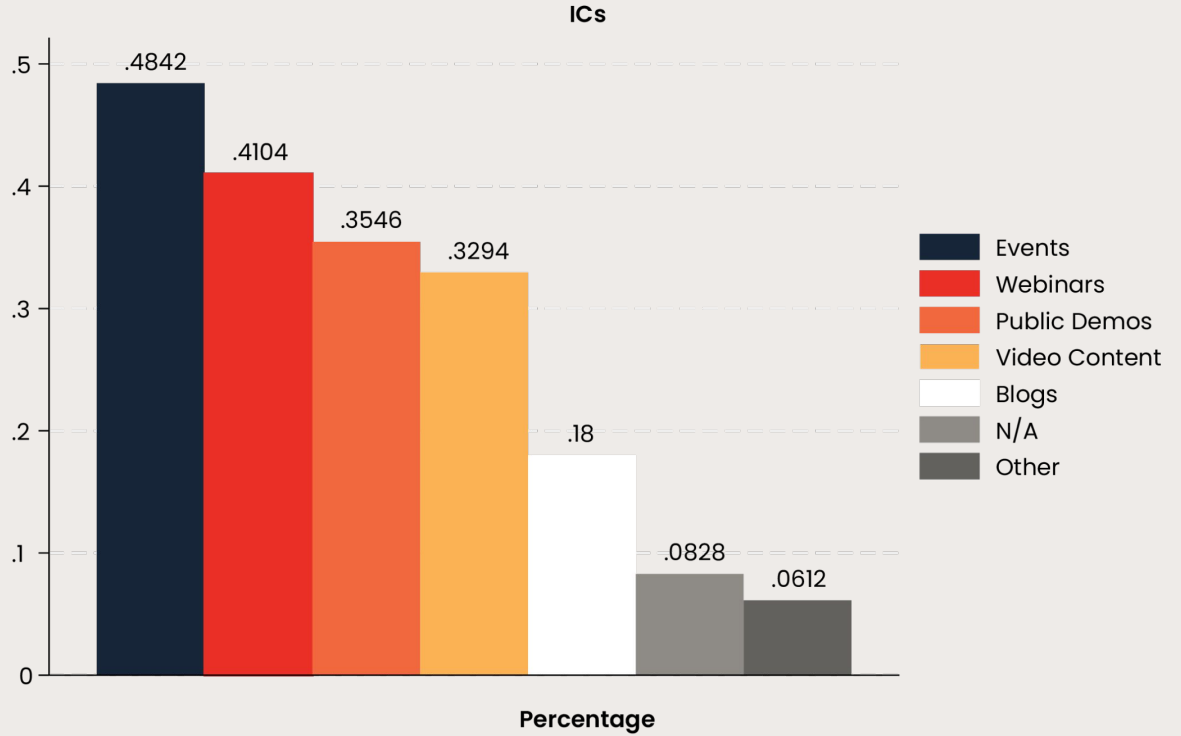
Workload

Supporting Different Revenue Functions: Marketing

73% of ICs support marketing in some fashion. This includes events, webinars, public demos, and video content.

*Note: Respondents could select multiple options.

**Note: Numbers represent percent of sample.



Workload

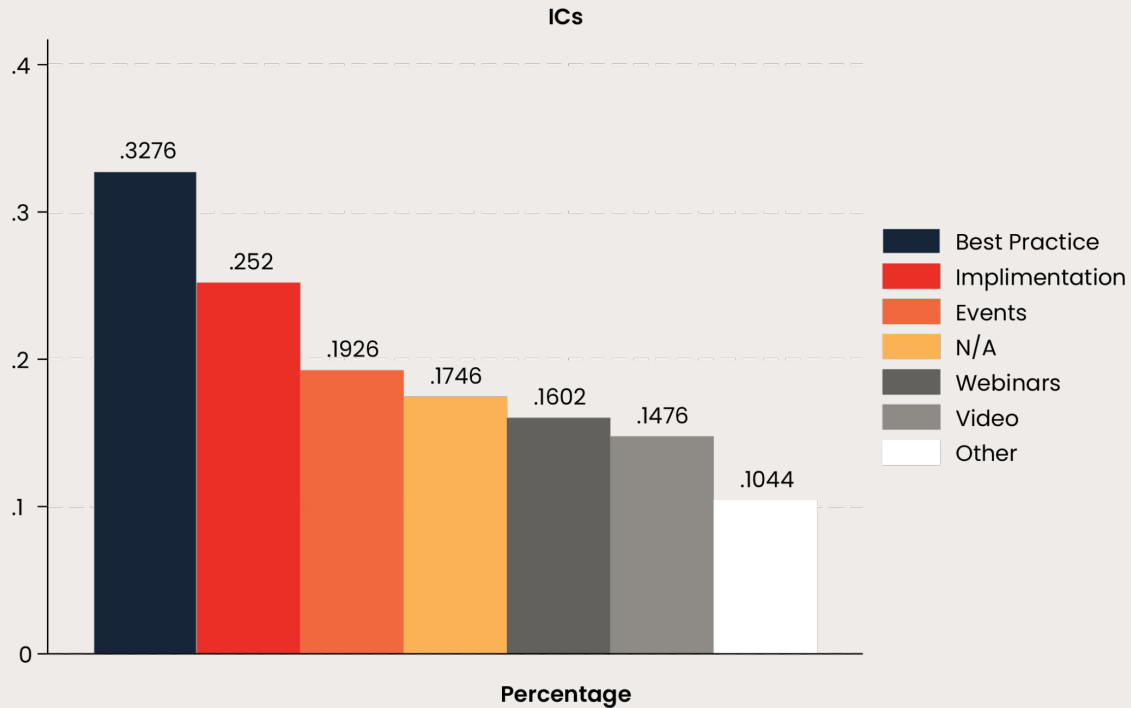
Supporting Different Revenue Functions: Customer Success

Over 70% of ICs support customer success in some fashion.

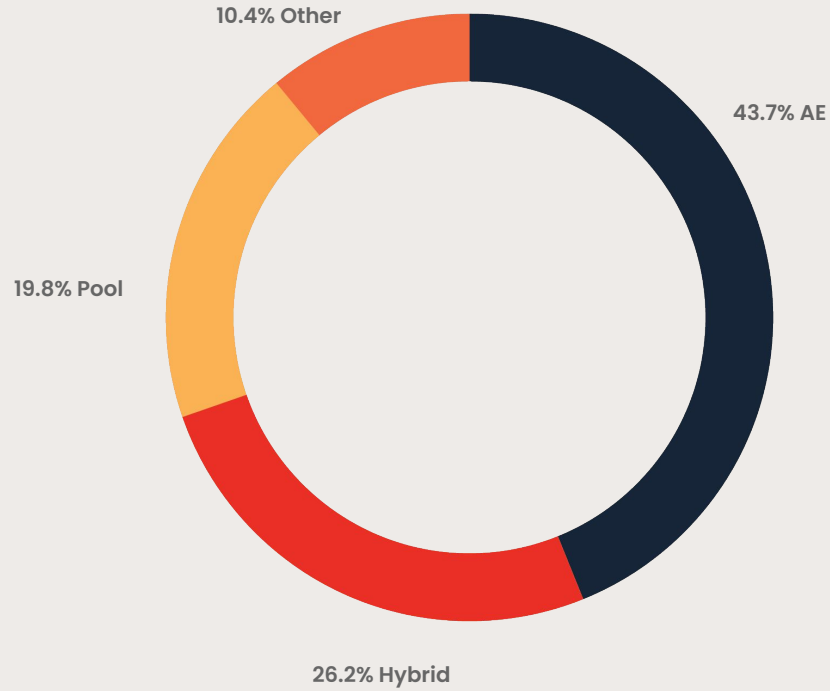
This includes best practices, implementation, and events.

*Note: Respondents could select multiple options.

**Note: Numbers represent percent of sample.



Which of the following best describes how you are assigned to fill requests for presales resources?



Workload

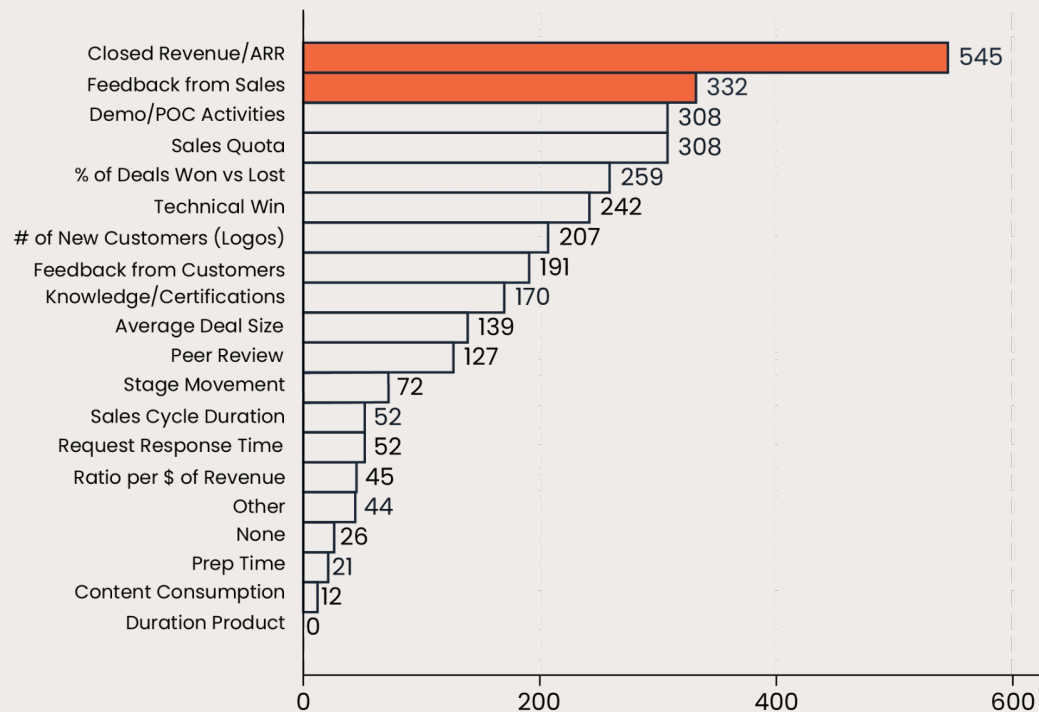
IC Assignment

The majority of respondents report being assigned to a particular AE(s) or are part of a Hybrid assignment model (combination of AE and Pooled assignment).

Workload

Presales KPIs

KPI priority has remained largely unchanged over the past three years.
Over 70% of respondents selected "Revenue" as their top KPI, followed by 45% who selected "Feedback from Sales."



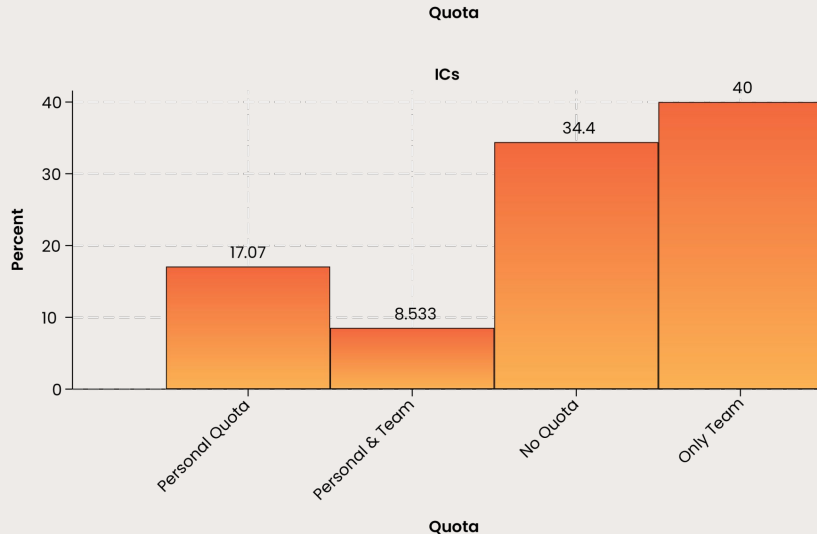
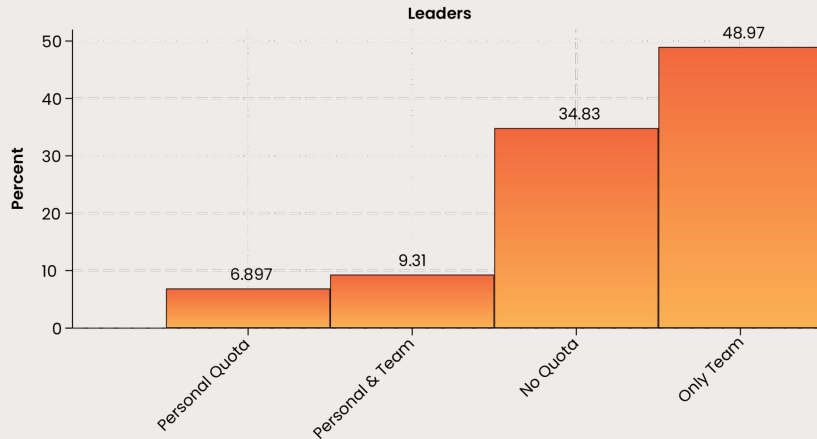
Workload

Performance Quota

Quotas are still on the rise.

This year, 65.6% of respondents had some kind of quota (e.g., team, personal, personal & team), up from 64% last year.

- The presence of personal quotas is closely linked to the seniority of ICs, which likely contributes to the correlation between quotas and OTE observed last year.
- Notably, Leaders are more likely to have a team-based quota, differentiating their performance metrics from those of ICs.



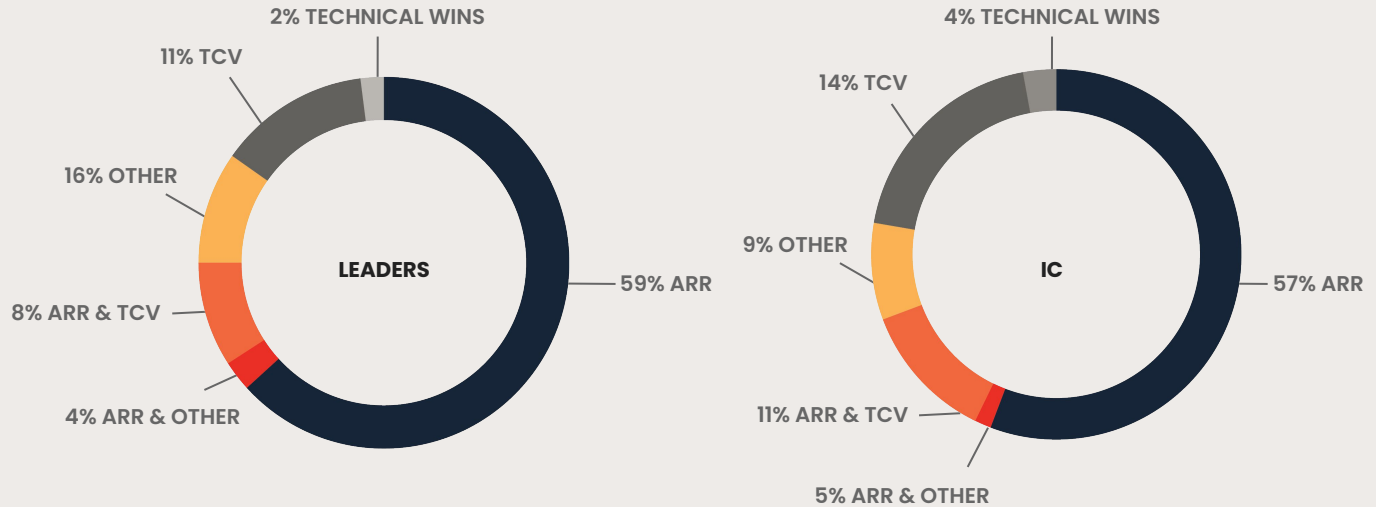
Workload

Measuring Quota

ARR remains the dominant measure for personal quota.

This year, the use of ARR as the sole quota measure jumped to nearly 60% for both ICs and Leaders, up from 48% and 35%, respectively. This indicates a significant shift away from combining ARR with other metrics to relying solely on ARR.

How is your personal quota measured?

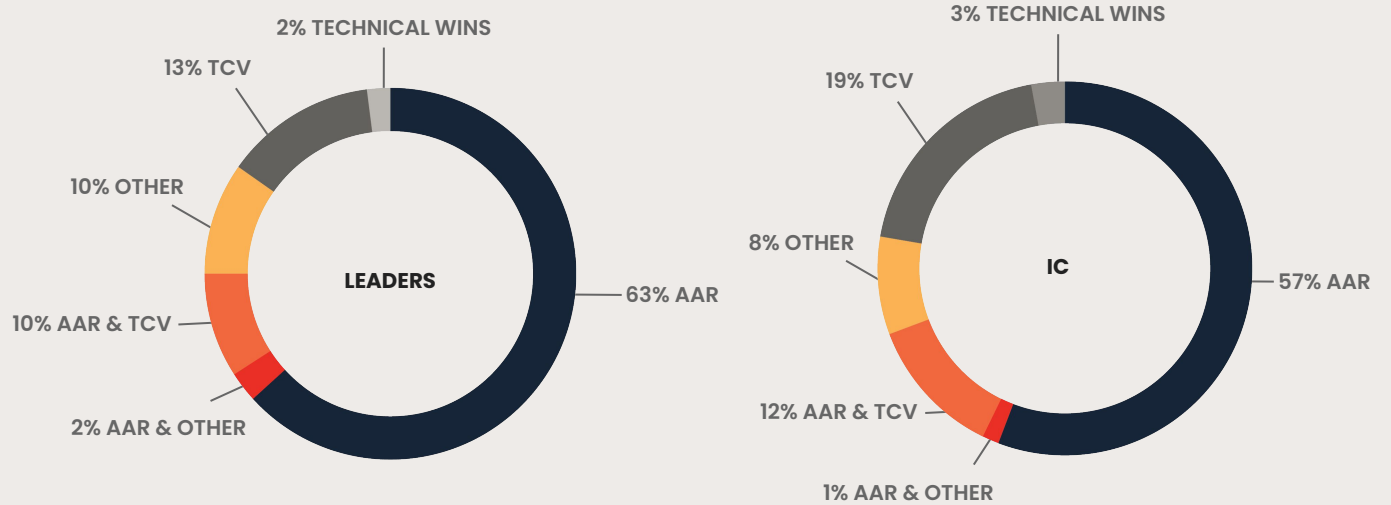


Workload

Measuring Quota (cont.)

A similar trend is observed in team quota measures. For ICs and Leaders, the use of AAR plus another metric dropped from 10% and 6% to just 1% and 2%, respectively, highlighting a broader move toward simplification and standardization in quota measurements.

How is your team quota measured?



Workload

Presales vs. Sales Influence

There has been little change in how Presales rates their importance relative to Sales from the previous year.

On average, respondents perceive Presales as having less influence than Sales, assigning it a score of four out of 10. This sentiment is particularly pronounced among those with higher AE:SE ratios, who report even less influence relative to Sales.

However, respondents working at smaller firms report a higher level of influence for Presales.



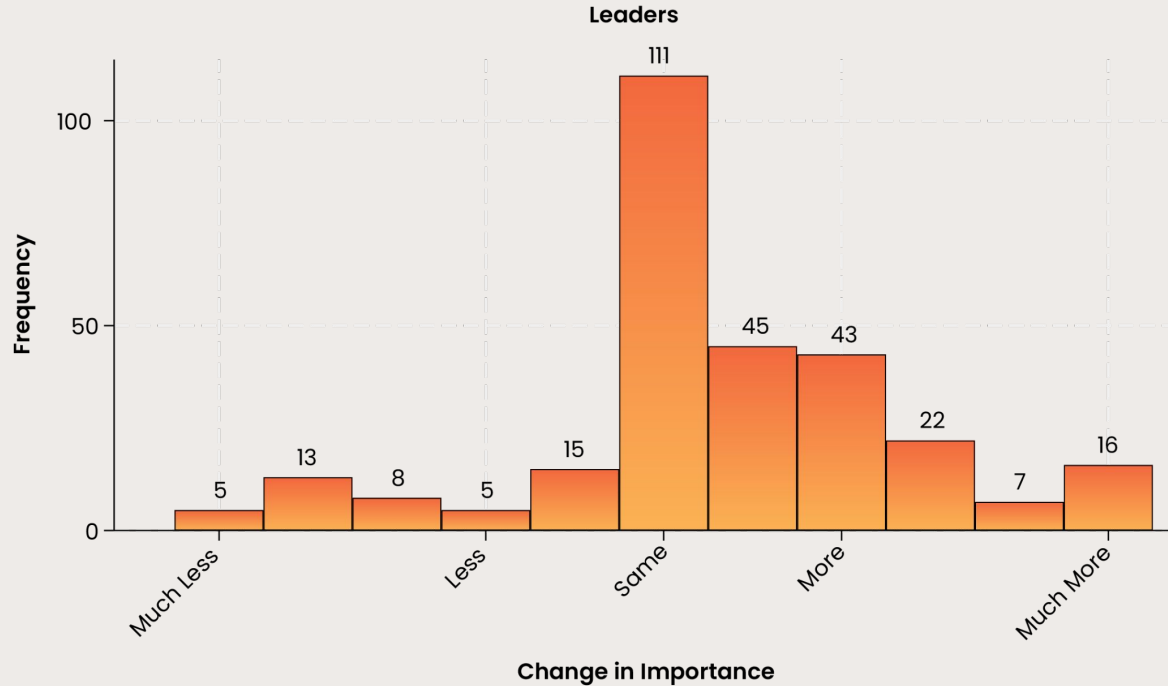
Workload

Presales Influence Over Time

The evolution of Presales' perceived importance within organizations is showing signs of deceleration.

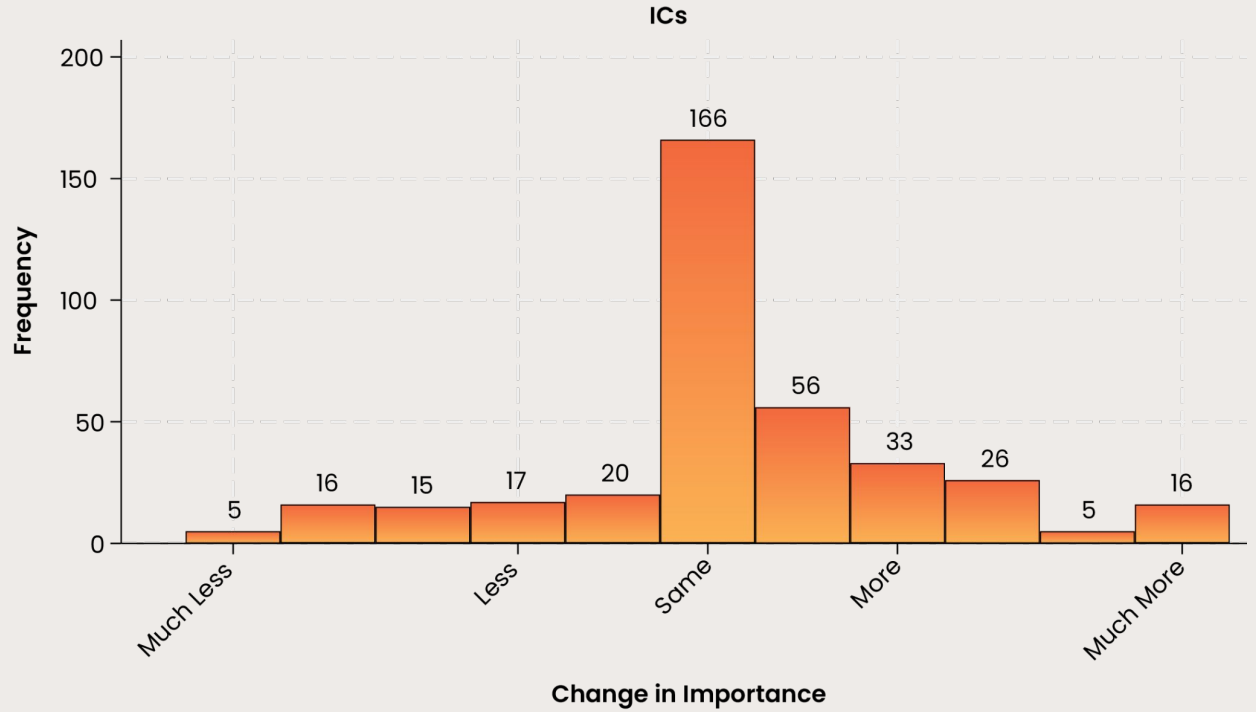
About 82% of respondents indicated that their influence has either remained stable or increased compared to the previous year. This marks a continued decrease from 90% two years ago and 86% last year, with the decline predominantly observed among ICs, where the average perception of influence has dropped from 5.5 to 5.2 on an 11-point scale.

Similar to the trend in recognition compared to Sales, respondents from smaller firms and those serving smaller customers are more inclined to report a growth in their influence over time.



Workload

**Presales Influence Over Time
(cont.)**

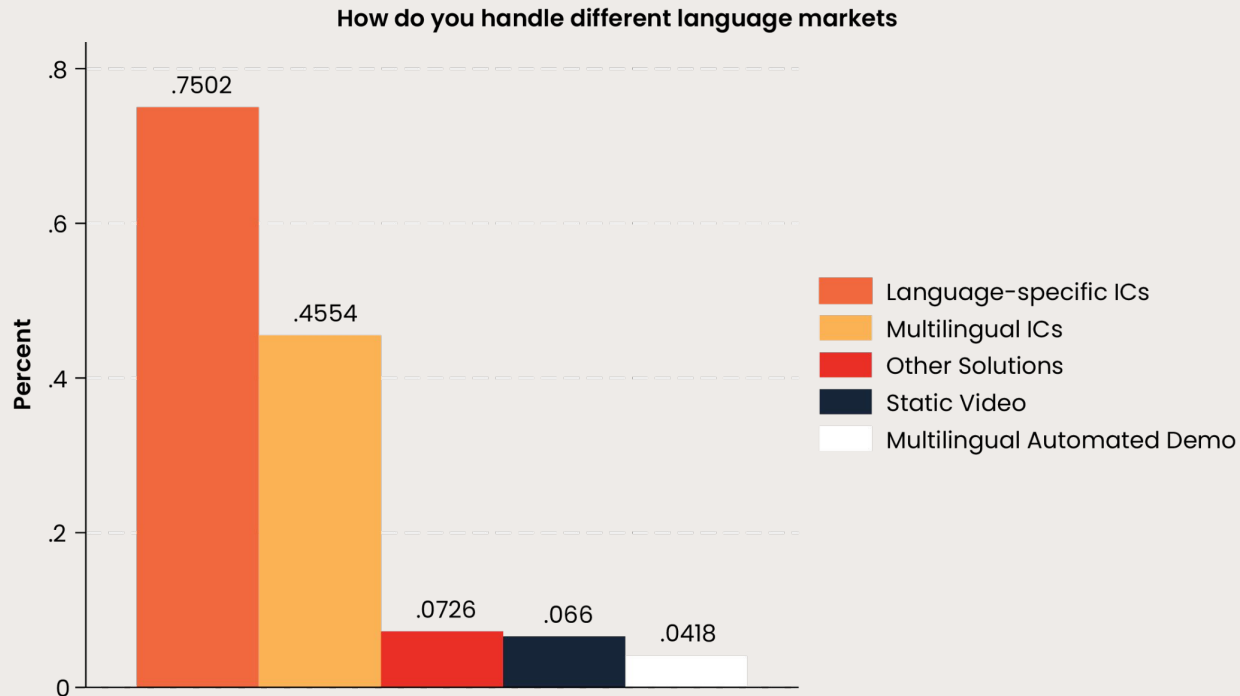


Workload

Multilingual Strategies

Like previous years, language specific ICs are still the most popular strategy for covering multiple language markets.

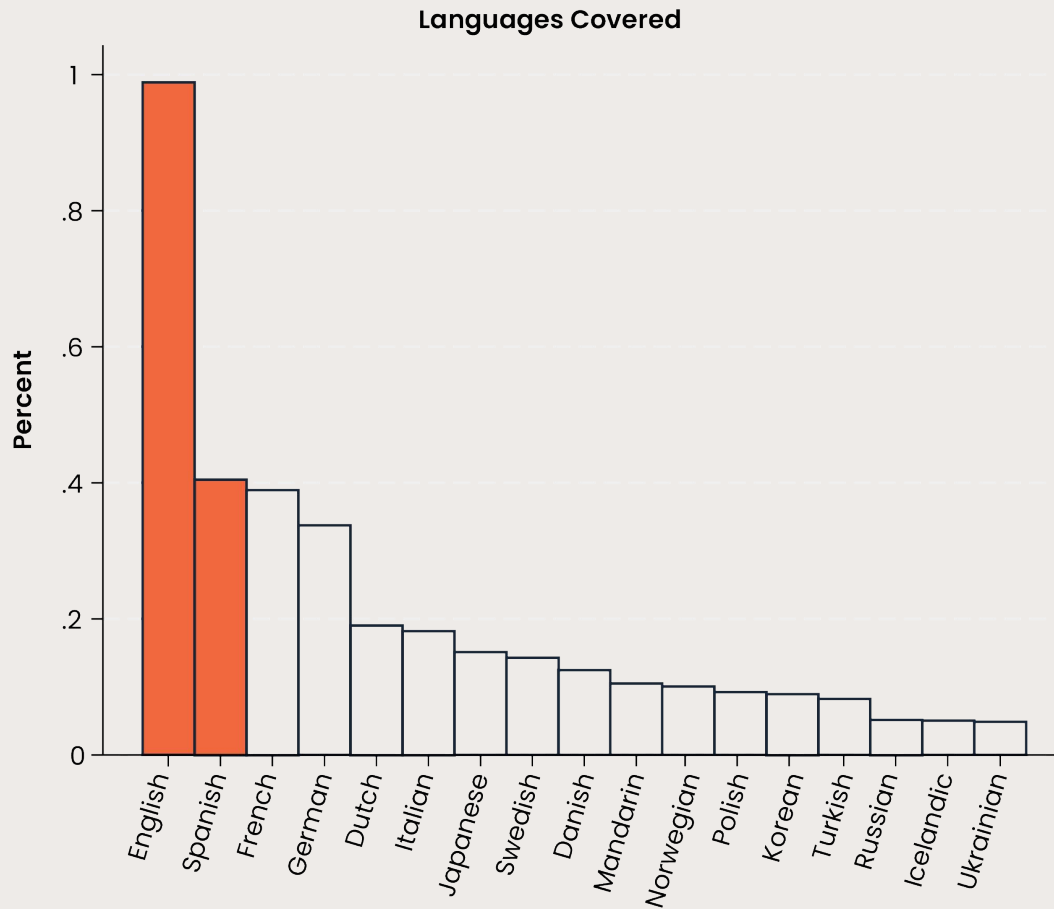
*Note: Respondents could select multiple options.



Workload

Languages

Nearly the entire sample conducts business in English with about 38% only servicing English speakers. 62% of the sample supports one other language.





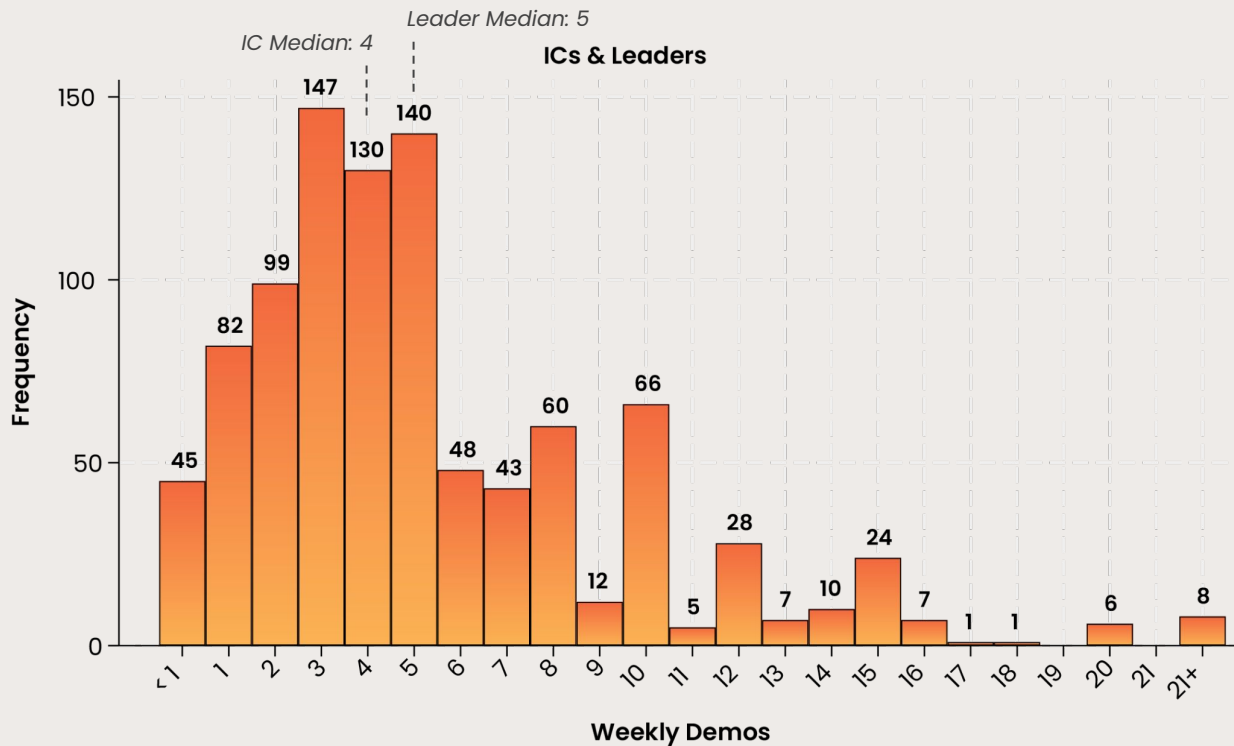
Demos

Demos

Demos Per Week

ICs and Leaders are delivering more demos per week YOY.

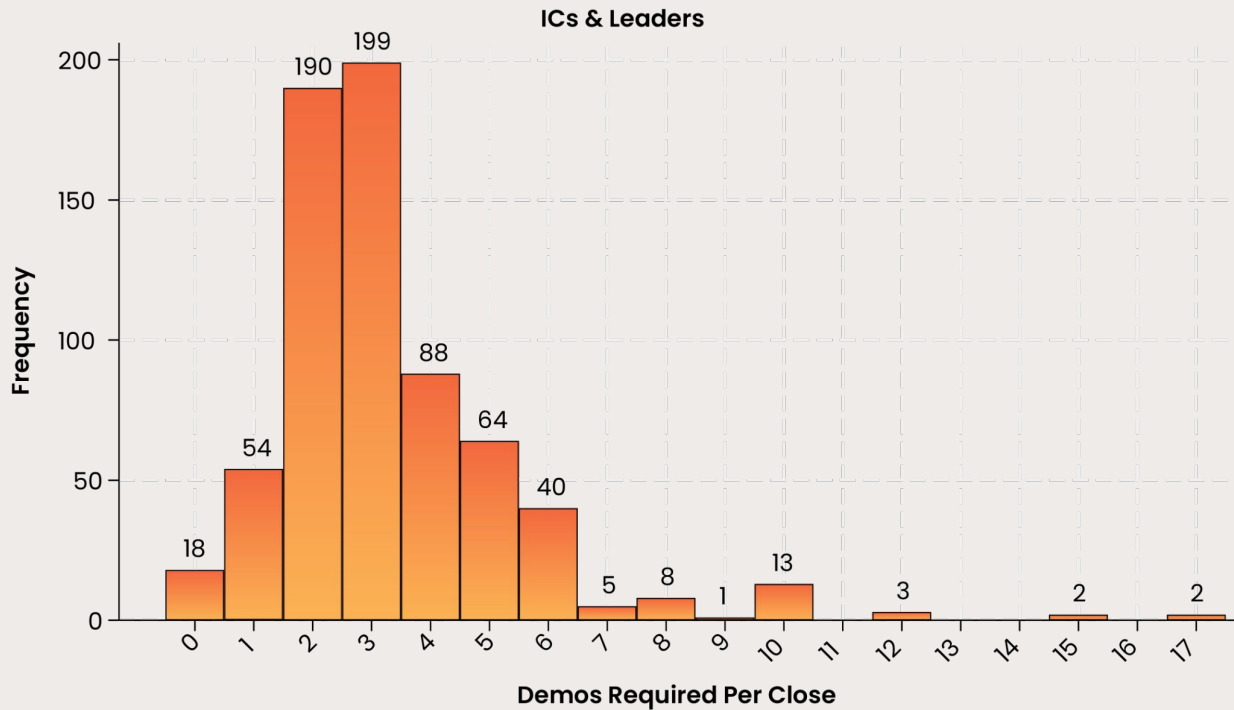
The reported median demos delivered per week is four for ICs and five for Leaders, which is one more demo per week than last year.



Demos

Demos Per Close

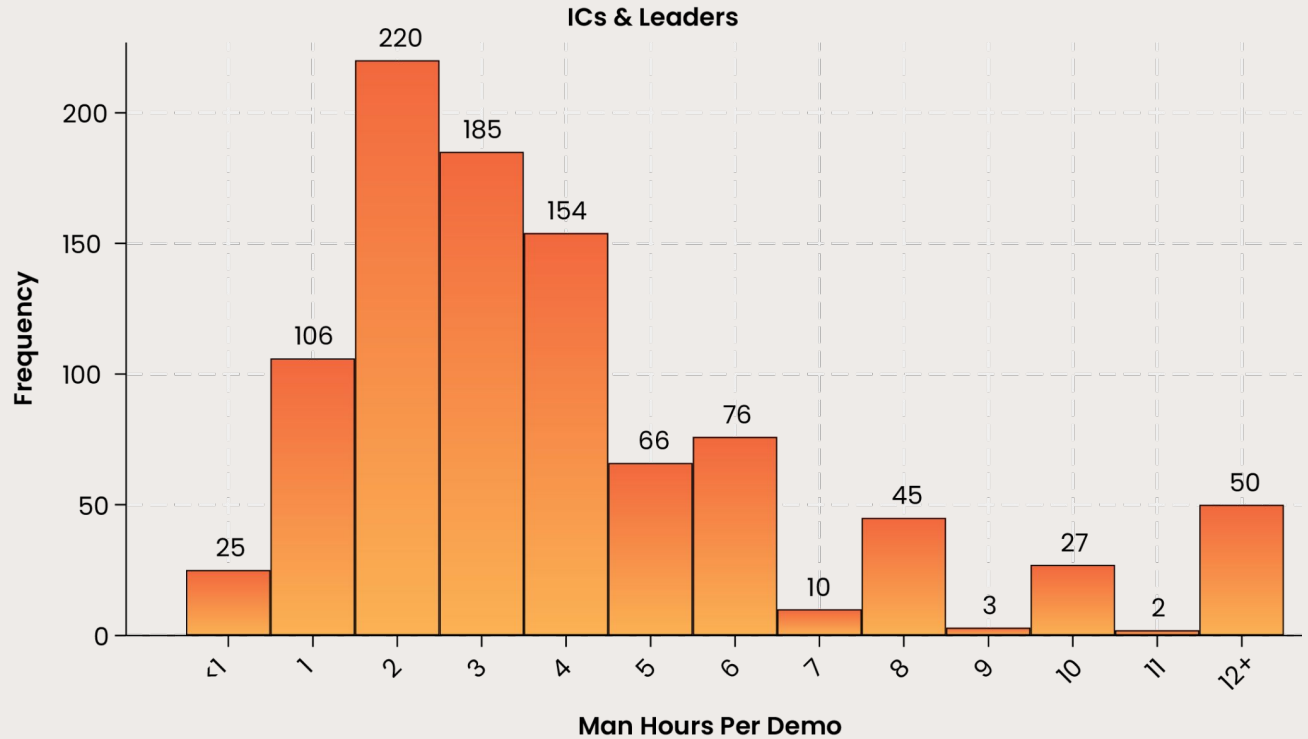
67% of respondents report closing a deal with three demos or less. This holds true for both ICs and Leaders.



Demos

Staff Hours Per Demo

The typical demo requires 3 hours of preparation.



Demos

Stakeholders Per Deal

There is a noticeable uptick in the complexity of Sales interactions, with the average number of stakeholders per deal rising from 4.8 to 5.9, marking a 19% increase from the previous year.



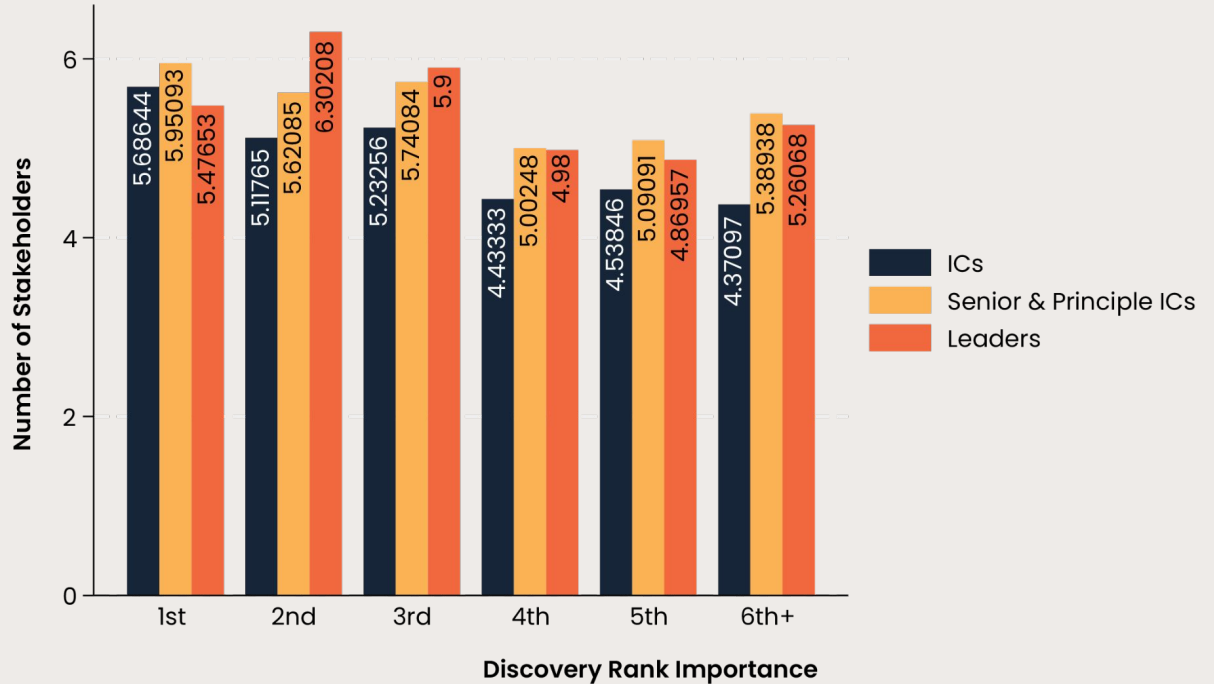
Demos

Stakeholders Per Deal (cont.)

Respondents with more stakeholders to close rank Discovery as more important for moving the needle, indicating that as the complexity and diversity of the buying group increase, so does the necessity for thorough and strategic discovery sessions.

These insights suggest that larger deals, which typically feature more stakeholders, come with longer sales cycles and higher stakes. Each stakeholder represents a potential veto point, making the cost of oversight significantly higher. The best strategy to mitigate this risk is through thorough Discovery, ensuring that every potential concern is addressed before it can derail a deal.

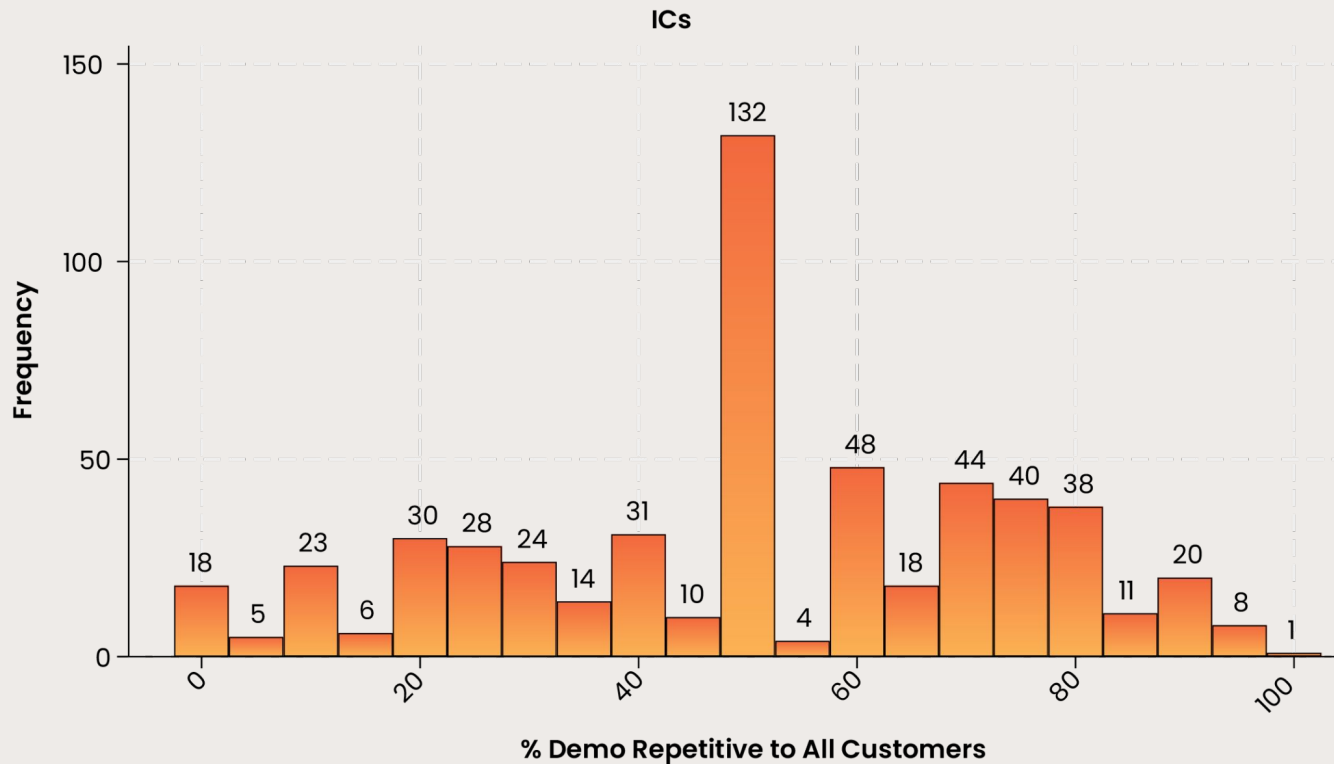
Average Stakeholders to Close by Rank Importance of Discovery



Demos

Repetitive Demos

The typical IC reports that about half of their demo content is customized to their audience.

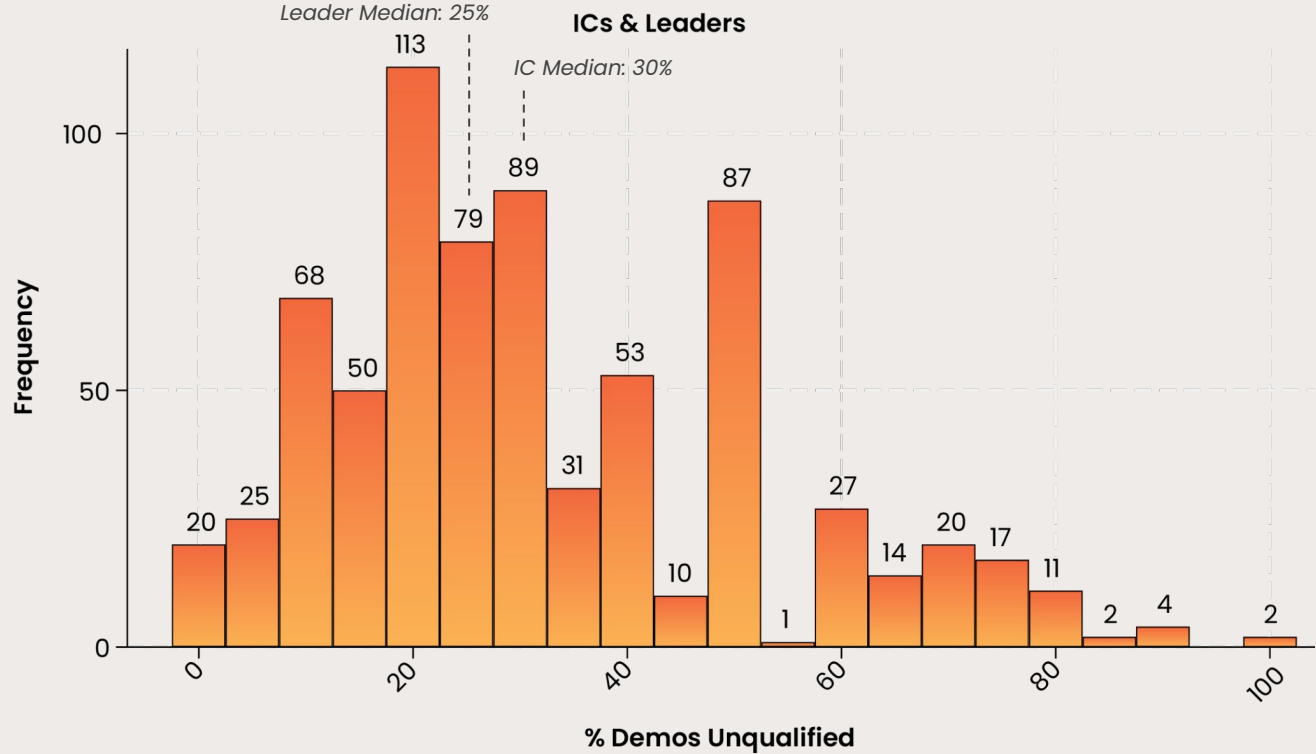


Demos

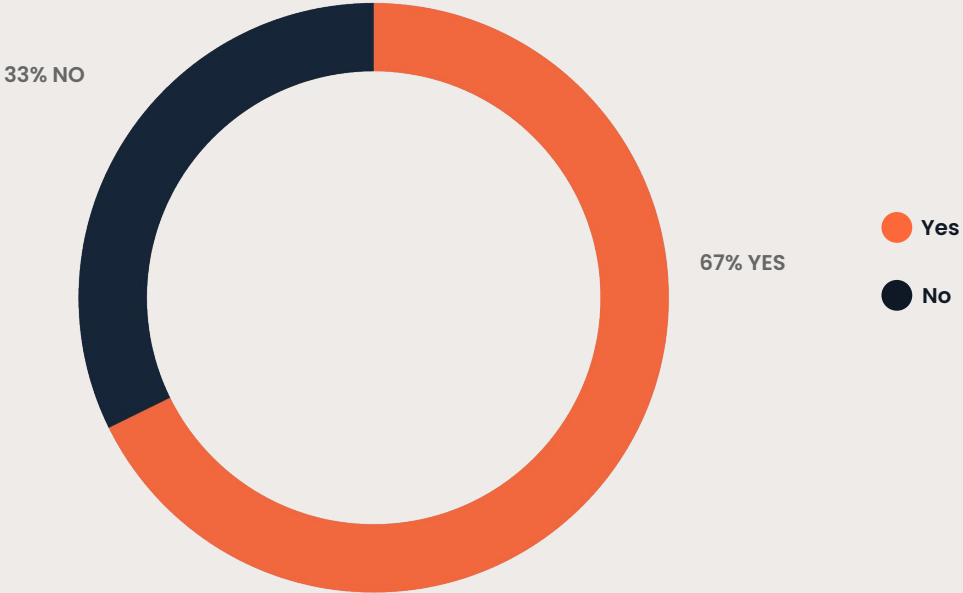
Unqualified Demos

The median IC reports a slightly higher percentage (30%) of unqualified demos compared to the typical Leader (25%). In other words, Leaders seem to be underestimating the percent of demos that are unqualified.

*Note: The average number of unqualified demos has not changed from 2023 to 2024. However, firms that automate have seen a slight decrease of about 3%, while firms that don't have seen a slight increase.



Do You Track "No Decision" Rates?



Demos

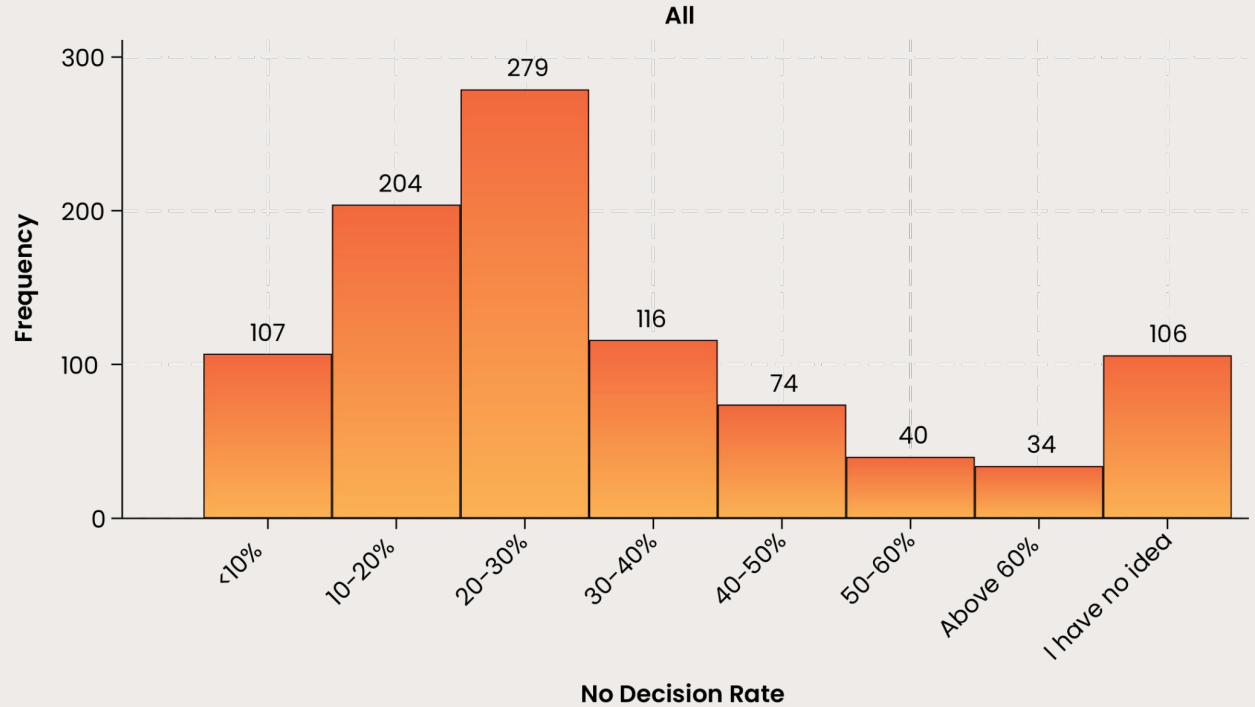
Tracking "No Decision" Rates

67% of respondents collect "No Decision" rates.

Demos

Tracking “No Decision” Rates (cont.)

Among these respondents, only 36% have “No Decision” rates less than 20%.



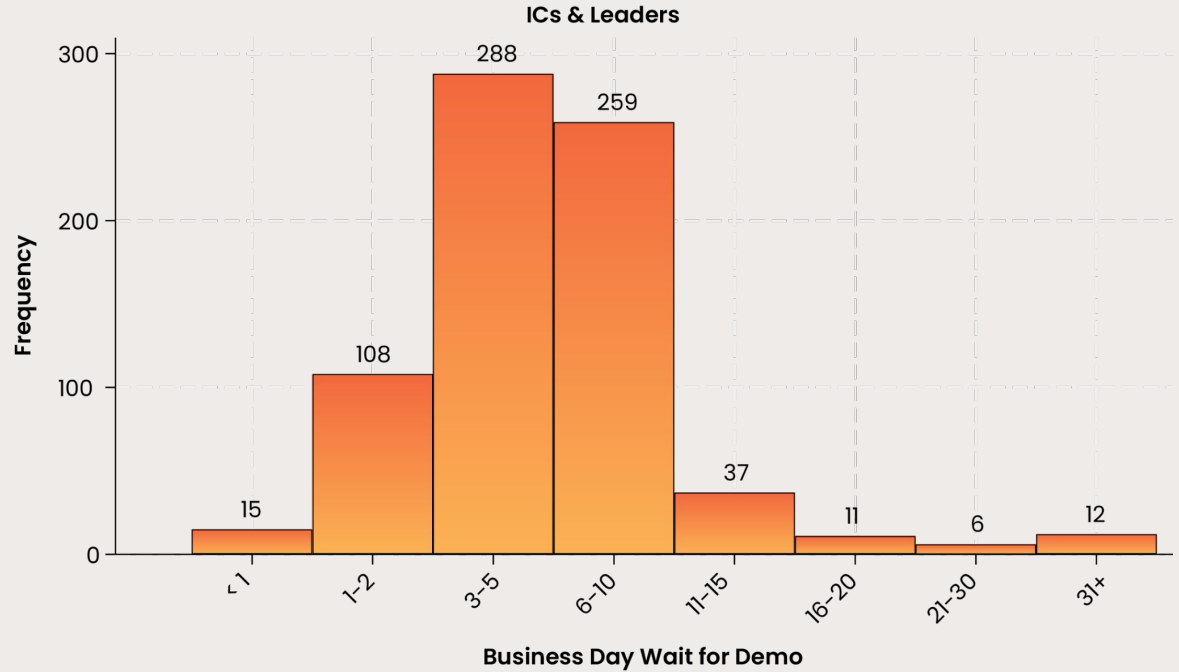
Demos

Demo Lag Time

The average lag time has increased by 5% from the previous year.

Approximately 44% of respondents experience lag times of at least **10 business days**, a figure that remains consistent with the previous year's data.

Notably, there has been a 28% increase in the occurrence of lag times exceeding 10 business days.



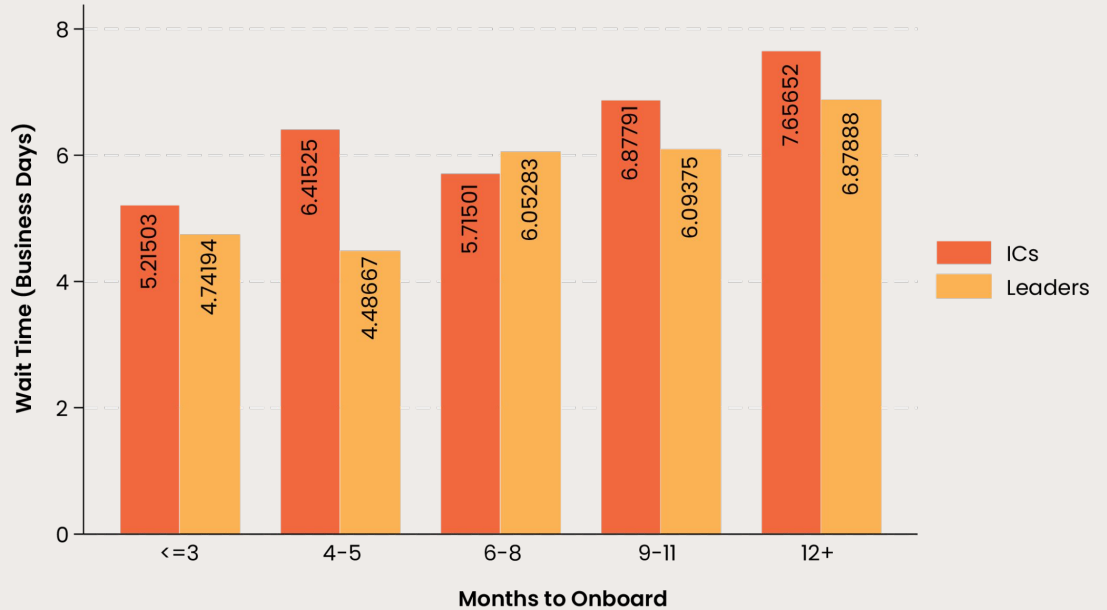
Demos

Demo Lag Time (Cont.)

Key predictors for lag time include:

- The onboarding duration for ICs
- The amount of time needed to prepare for a demo
- The experience of demo scheduling – ICs tend to report longer wait times compared to Leaders

Average Demo Wait Time by Time to Onboard

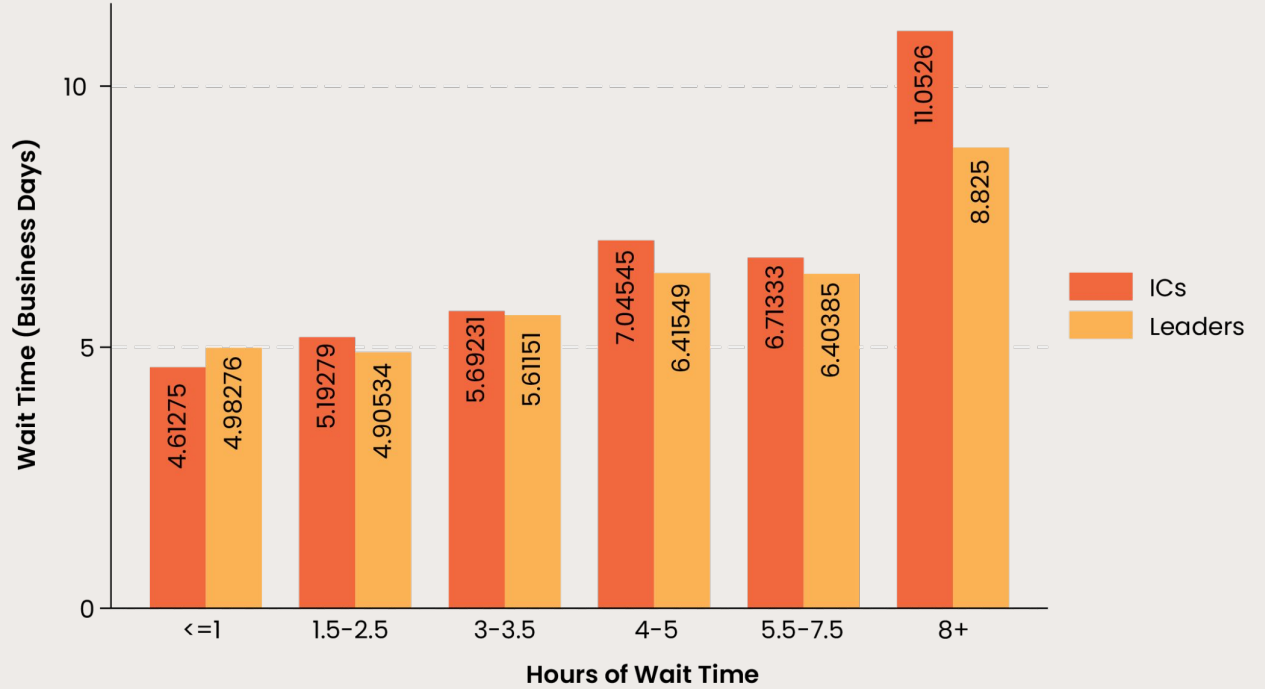


Demos

Demo Lag Time (Cont.)

Demos that require more preparation and delivery time are associated with longer wait times.

Average Demo Wait Time by Man Hours Per Demo



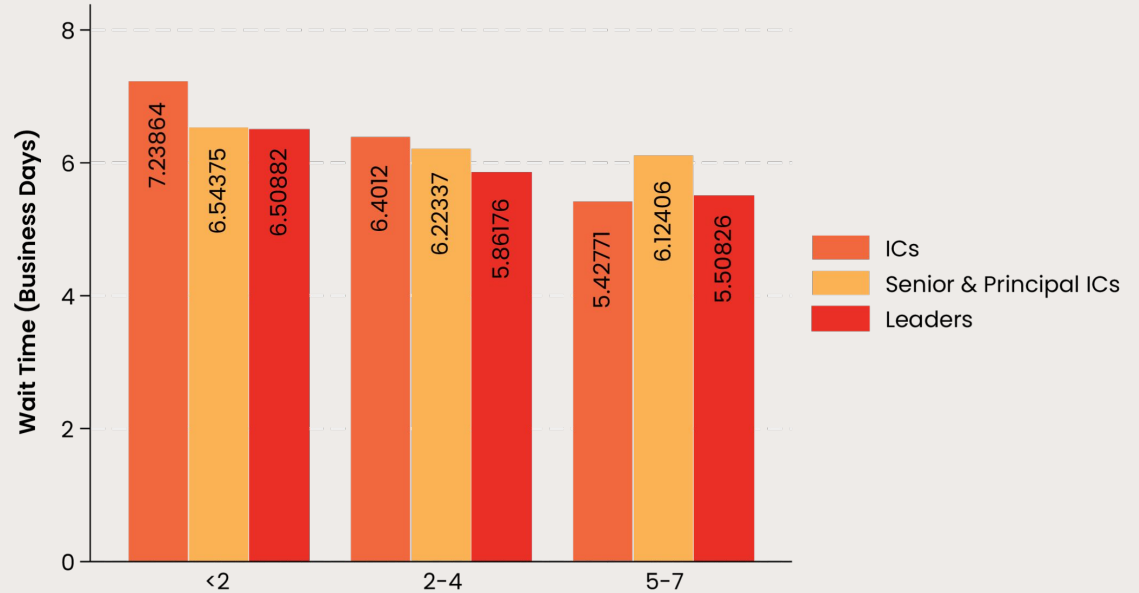
Demos

Demo Lag Time (Cont.)

Conversely, certain conditions are associated with shorter lag times:

- Higher AE:SE ratios, suggesting that a larger sales force relative to technical support can expedite the demo process
- An increase in the number of demos required to close a deal, indicating that a higher volume of demonstrations may streamline the preparation and scheduling process

Average Demo Wait Time by AE/SE Ratio

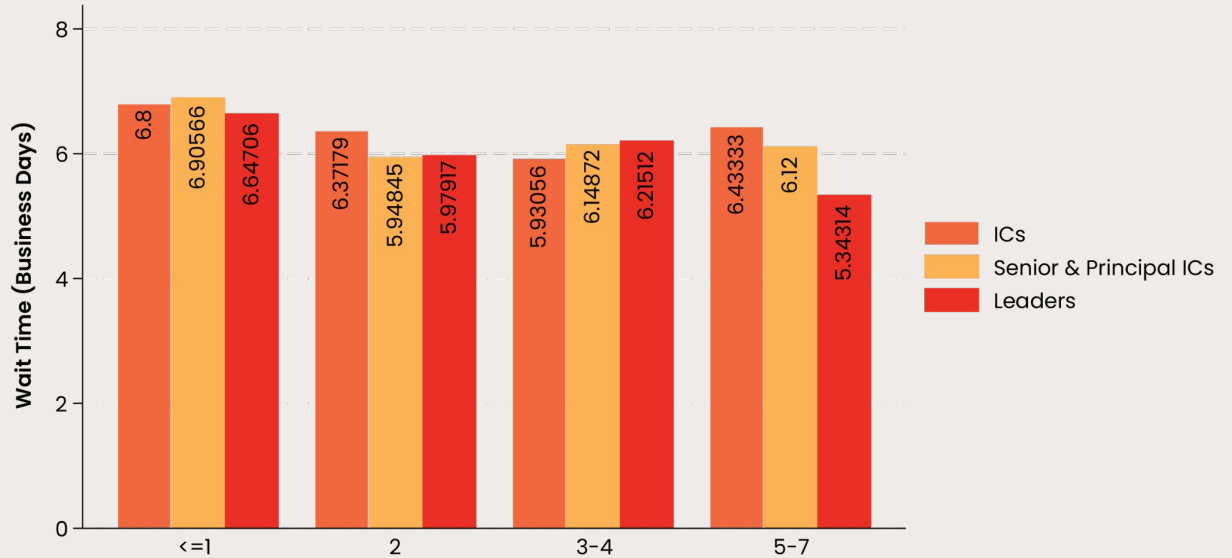


Demos

Demo Lag Time (Cont.)

- An increase in the number of demos required to close a deal, indicating that a higher volume of demonstrations may streamline the preparation and scheduling process

Average Demo Wait Time by Demos Per Close



Demos

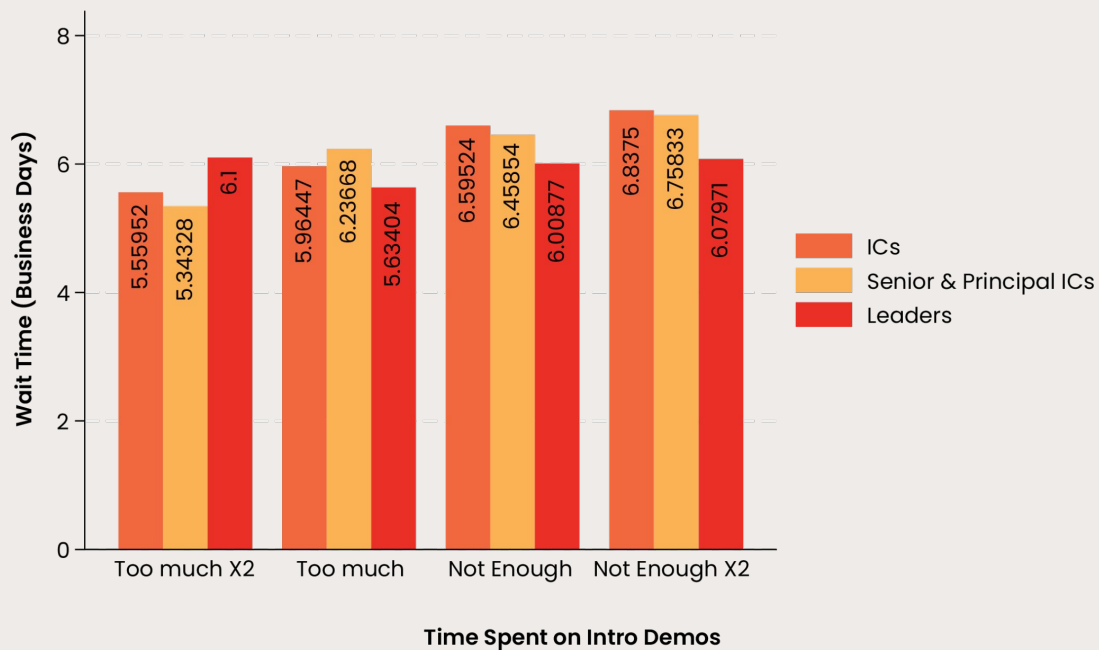
Demo Lag Time (Cont.)

Evidence points to firms chasing shorter lag times.

While more demos per close and higher AE:SE ratios are associated with shorter wait times, the quality and focus of these demos are equally important to consider:

- Firms attempting to decrease demo wait times might be allocating excessive time for ICs on introductory demos. This could potentially dilute the effectiveness or depth of these initial customer engagements
- On the other hand, respondents indicating that not enough time is spent preparing for demos experience longer wait times. This highlights a balance that must be struck between adequate preparation and efficient scheduling to optimize demo wait times without compromising the quality of the demo

Average Demo Wait Time By Misallocation of Intro Demos



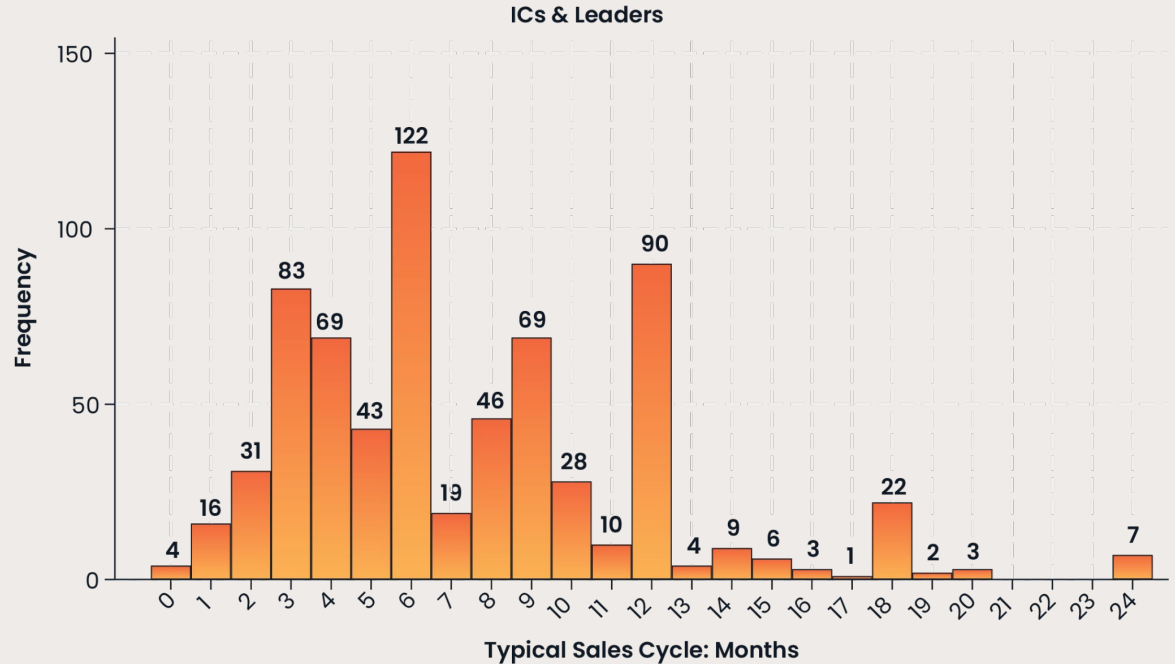
Demos

Sales Cycle

The typical sales cycle is six months, but nearly 20% are a year or longer.

One potential factor contributing to the longer sales cycles could be the depth and quality of the discovery process. This aligns with the finding that:

- The more unqualified demos, the longer the sales cycle
- Those with more stakeholders and demos per close have longer sales cycles
- Larger customer sizes correlate with longer sales cycles



Demos

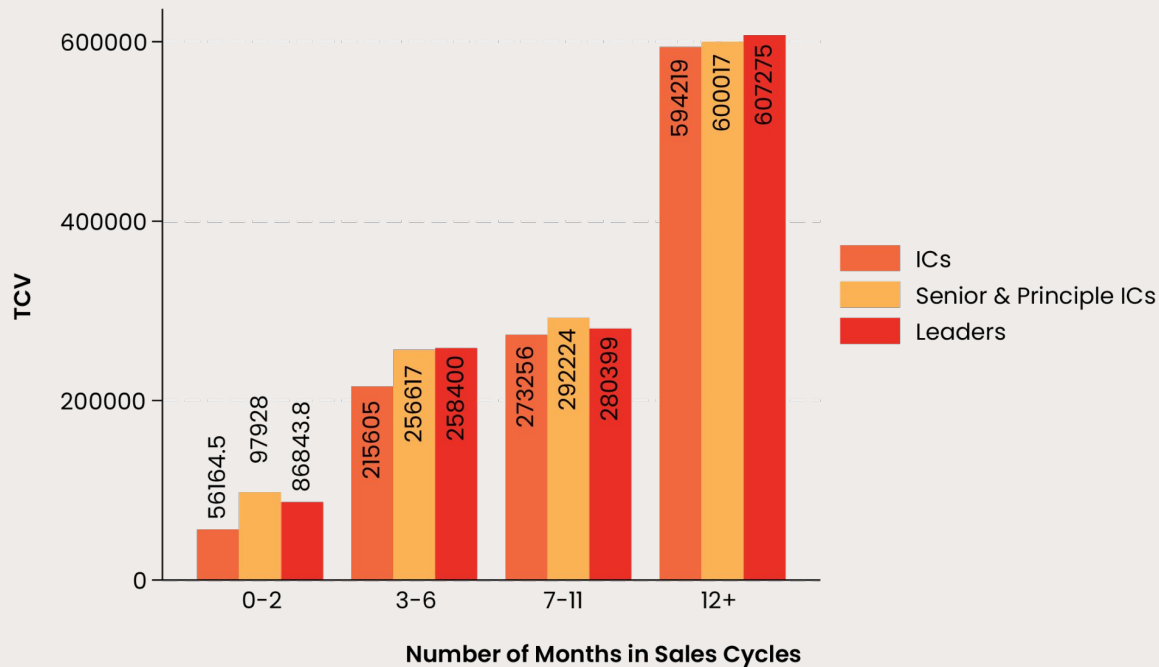
Sales Cycle (cont.)

Some additional factors that correlate with sales cycles include:

- **Total Contract Value (TCV).** Higher TCV is associated with longer sales cycles
- **KPIs.** More KPIs correlate with shorter sales cycles
- **Unqualified Demos** Firms that deliver more unqualified demos have longer sales cycles

One potential factor contributing to the longer sales cycles could be the depth and quality of the discovery process. This aligns with the finding that more ICs are prioritizing Discovery.

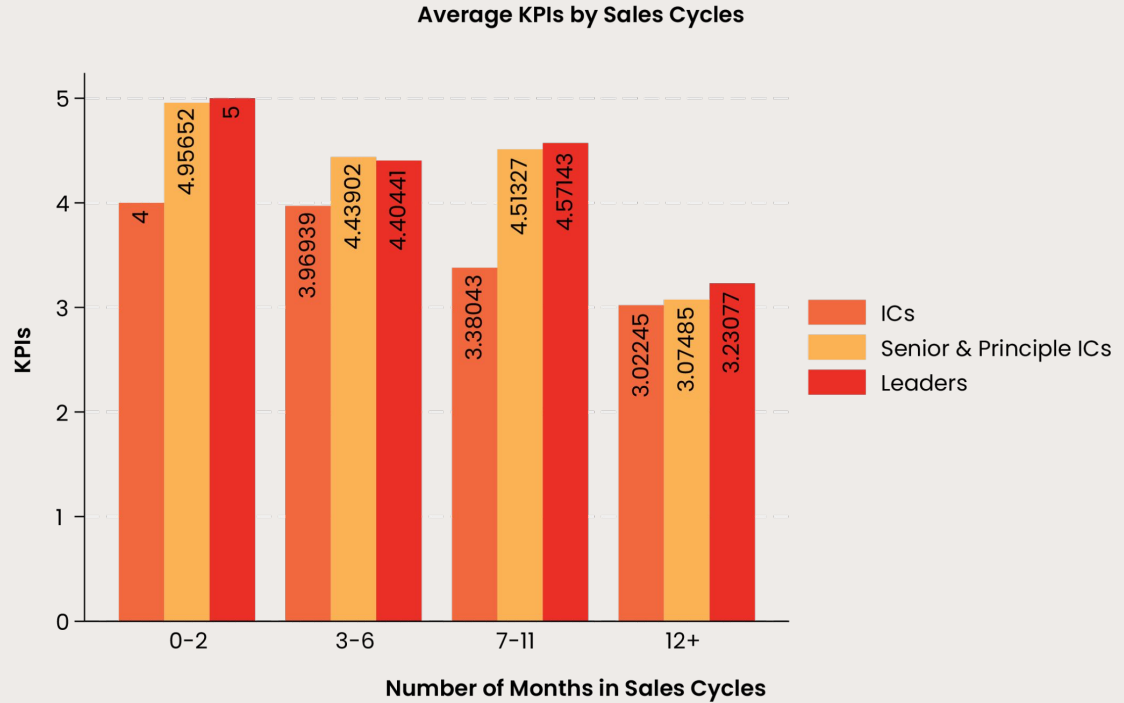
Average Total Contract Value by Sales Cycles



Demos

Sales Cycle (cont.)

Even when accounting for things like total contract value, stakeholders to close, and other relevant factors more KPIs are associated with shorter sales cycles. This implies that performance indicators expose problems that could be needlessly extending sales cycles.

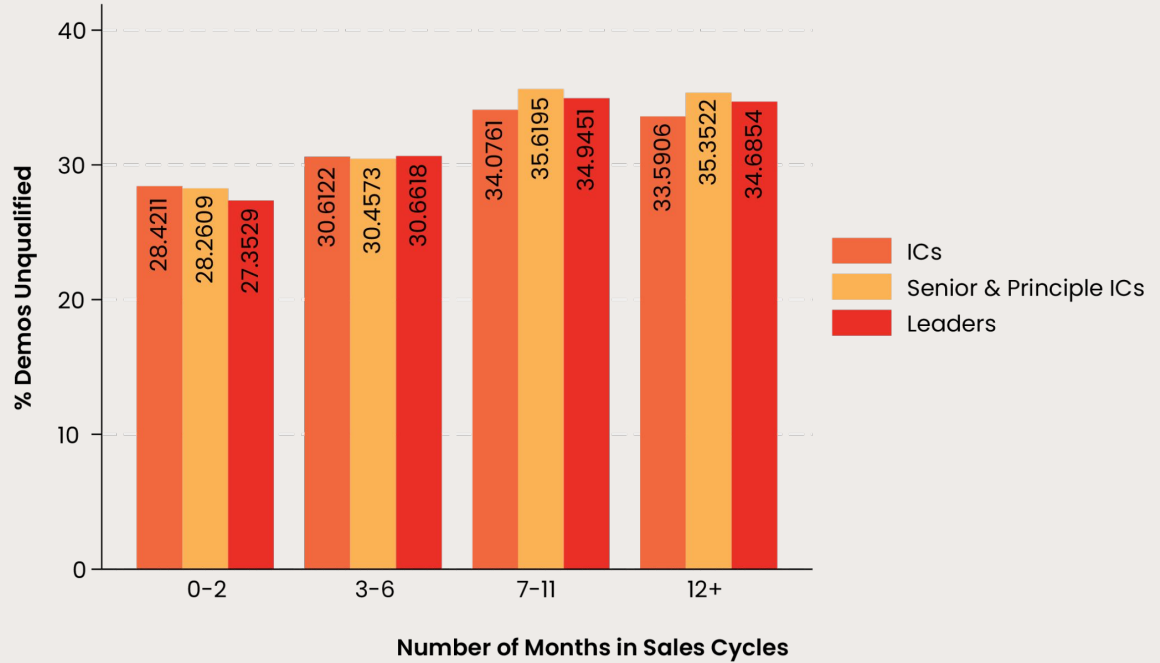


Demos

Sales Cycle (cont.)

Unqualified demos consume the time of everyone involved, which prevents them from progressing sales forward.

Average % Demos Unqualified by Sales Cycles





Burnout

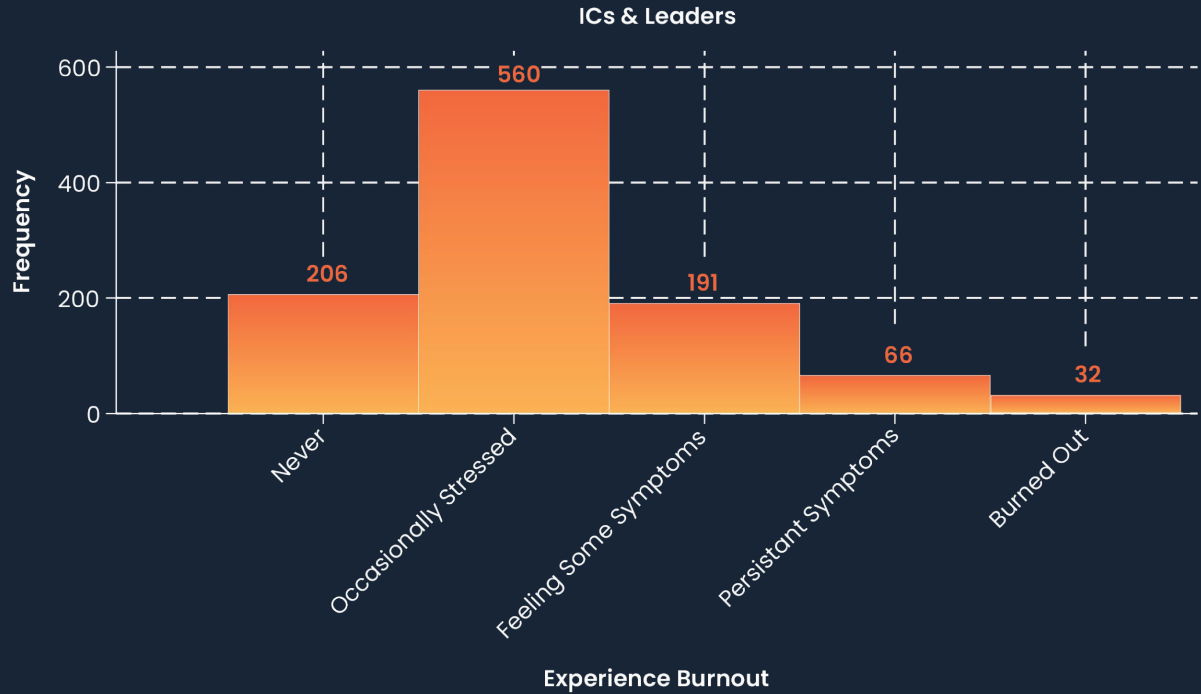


Burnout

Costs of Burnout

Nearly 27% of ICs and Leaders report feeling at least some symptoms of burnout.

There has been a marked increase in burnout for ICs specifically, with up to 26% experiencing symptoms — an increase from 22% in 2023.



Burnout

Key Drivers of Burnout

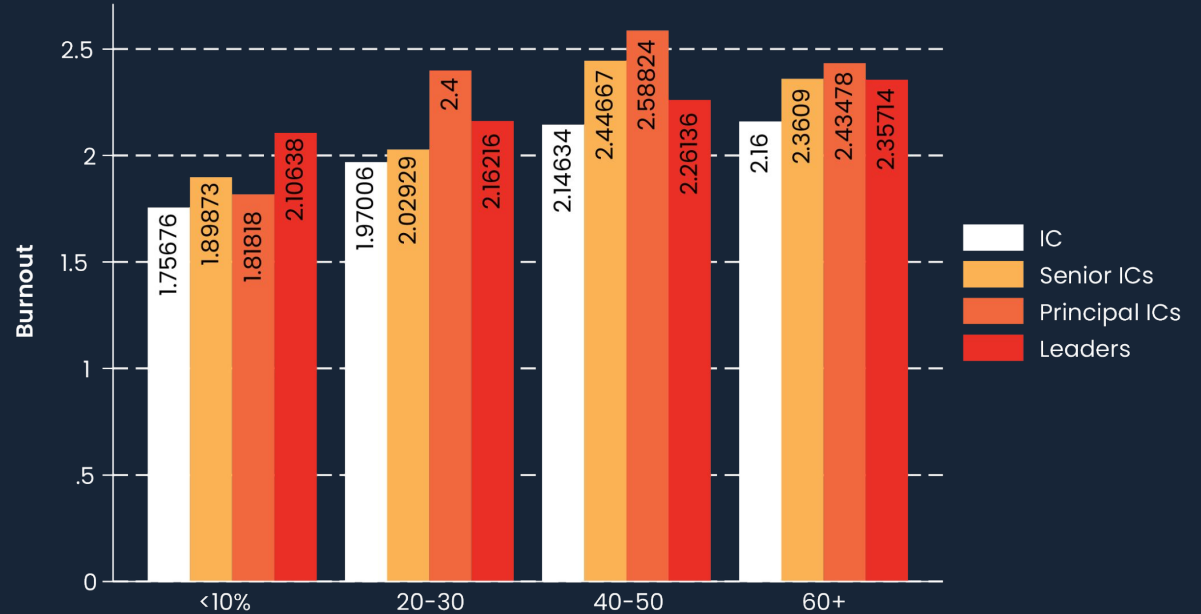
The most pronounced cause of burnout stems from conducting unqualified demos.

A 10% increase in unqualified demos has an impact on burnout equivalent to working two additional crunch weeks.

Regardless of rank, this effect is also akin to the burden of supporting 10 additional products or undertaking about four extra demos in a week.

Crunch weeks = Weeks worked over 55 hours in a three-month period

Average Burnout by % Demos Unqualified



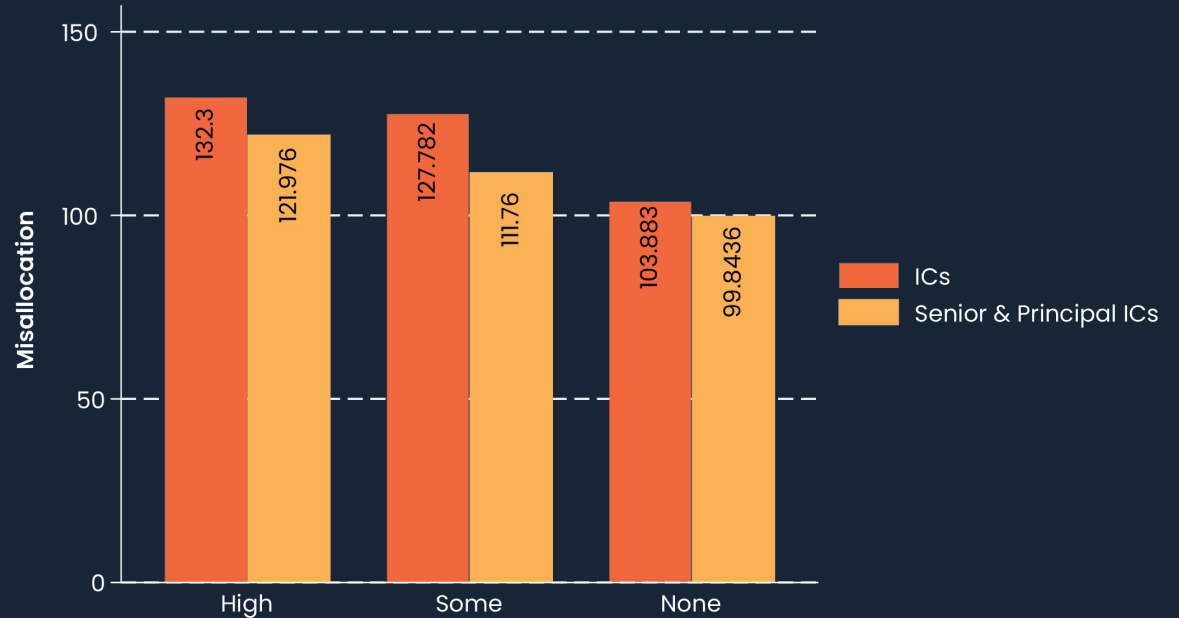
Burnout

Key Drivers of Burnout (Cont.)

There is a strong correlation between inefficiency and burnout, particularly for ICs.

This relationship underscores the hidden emotional and mental costs associated with unproductive workflows.

Average Misallocation by Burnout



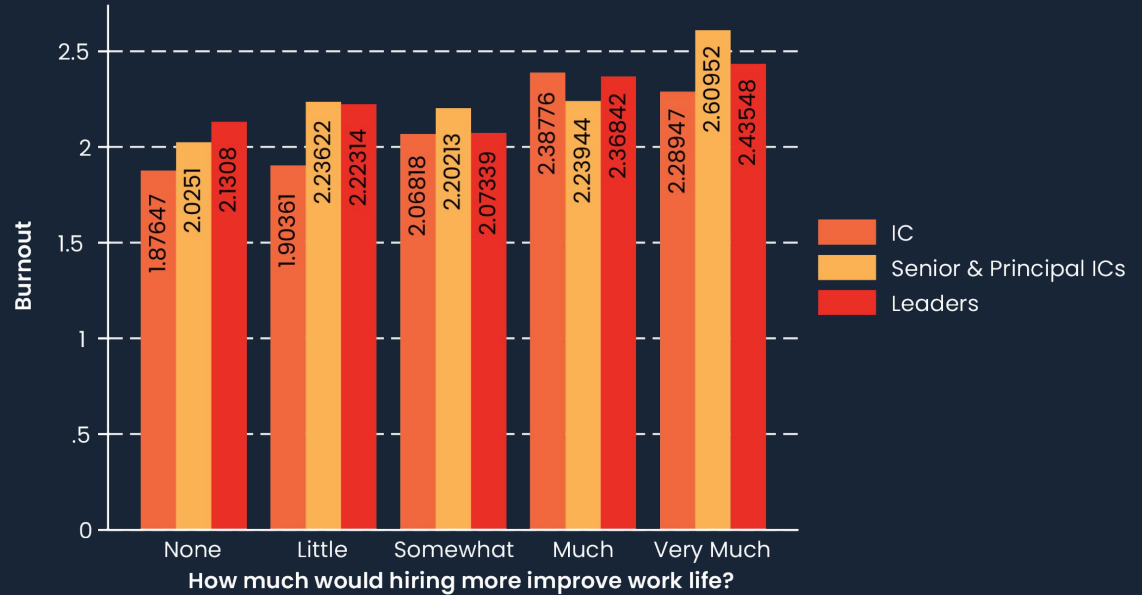
Burnout

Key Drivers of Burnout (Cont.)

Long hours and the lack of work-life balance predict burnout.

Fewer hands mean heavier loads for each team member. Respondents who prioritized "hiring more" as a key to improving work life frequently report higher levels of burnout. This suggests that a leaner team structure often results in increased workloads for existing staff, exacerbating stress and burnout.

Average Burnout by Improve Conditions: Hire More



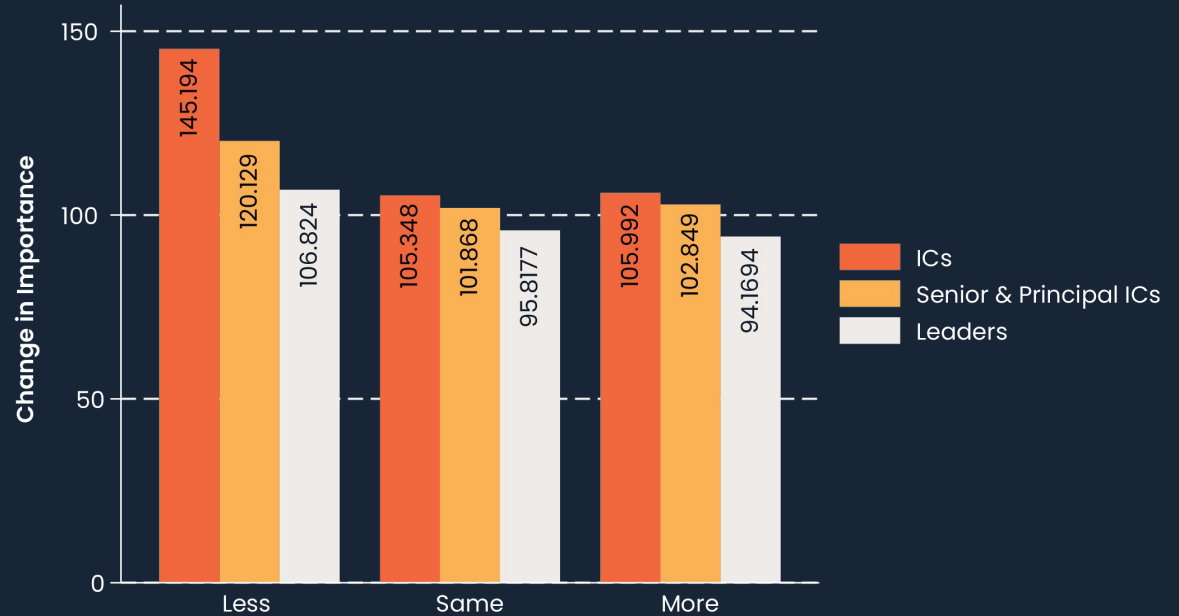
Burnout

Key Drivers of Burnout (Cont.)

ICs want recognition for the value they bring to the sales cycle.

Those who experience larger misallocations of time consistently view their role as **less pivotal** compared to their counterparts in Sales. They are also more likely to rate themselves as **less important over time**.

Average Misallocation by Change in Importance



Burnout

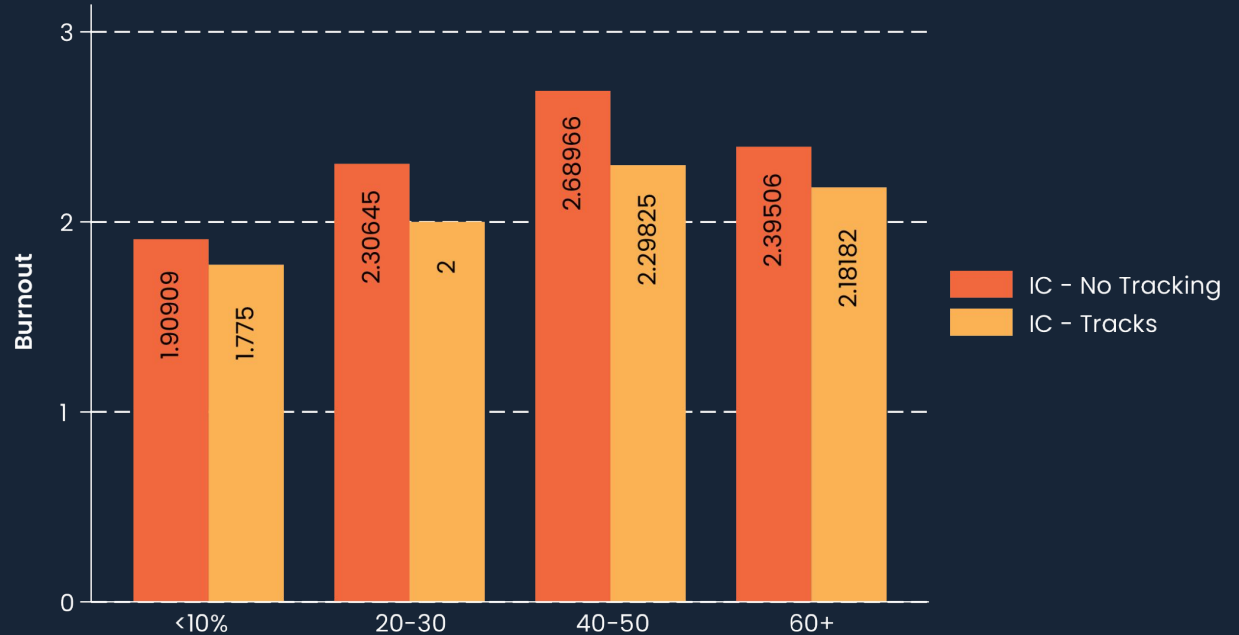
Key Drivers of Burnout (Cont.)

Lack of “no decision” rate tracking exacerbates burnout.

Firms that neglect to monitor “no decision” rates report increased burnout across all levels, despite the number of unqualified demos.

The connection might be tied to the concept of misallocation – where not tracking “no decision” outcomes could lead to frustration from not understanding the reasons behind sales failures.

Average Burnout for ICs by % Demos Unqualified & Track No Decision Rate



Burnout

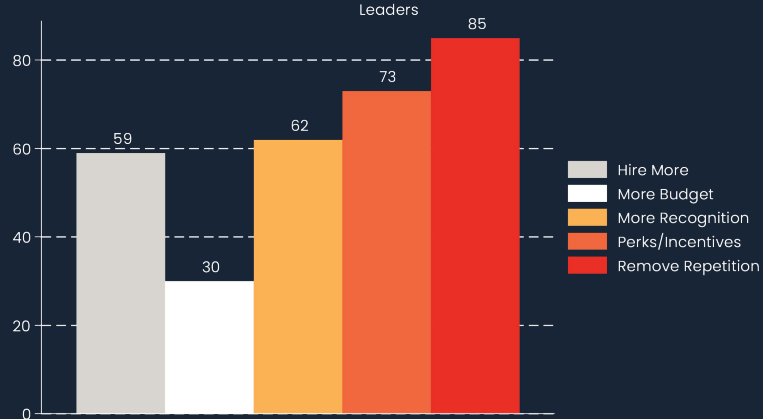
Quality of Work Life

The quest for improved quality of work life reveals a disconnect between ICs and Leaders.

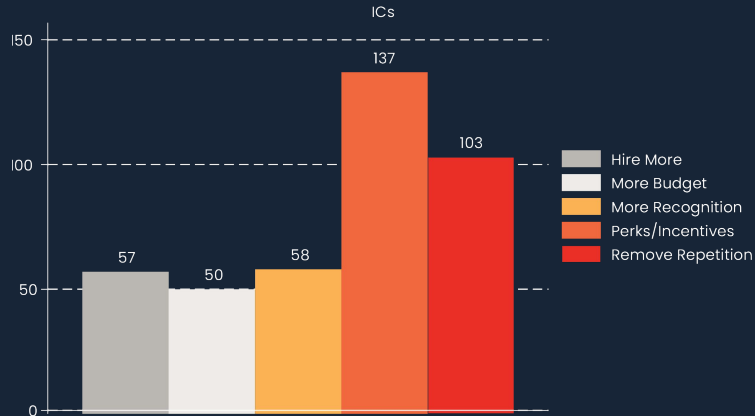
Leaders consistently prioritize the reduction of repetitive tasks as the primary strategy to enhance work-life quality. This is closely followed by an emphasis on perks and incentives. While allocating more budget never emerged as the top solution, it consistently appeared near the top of leaders' preferences, indicating its perceived importance in facilitating other improvements.

In contrast, ICs exhibit greater variability in their rankings of potential improvements. They value perks and incentives, along with the elimination of repetitive tasks, as the key to enhancing their work experience.

How Can Work Be Improved for Your Team?



What Would Best Improve My Work Life?

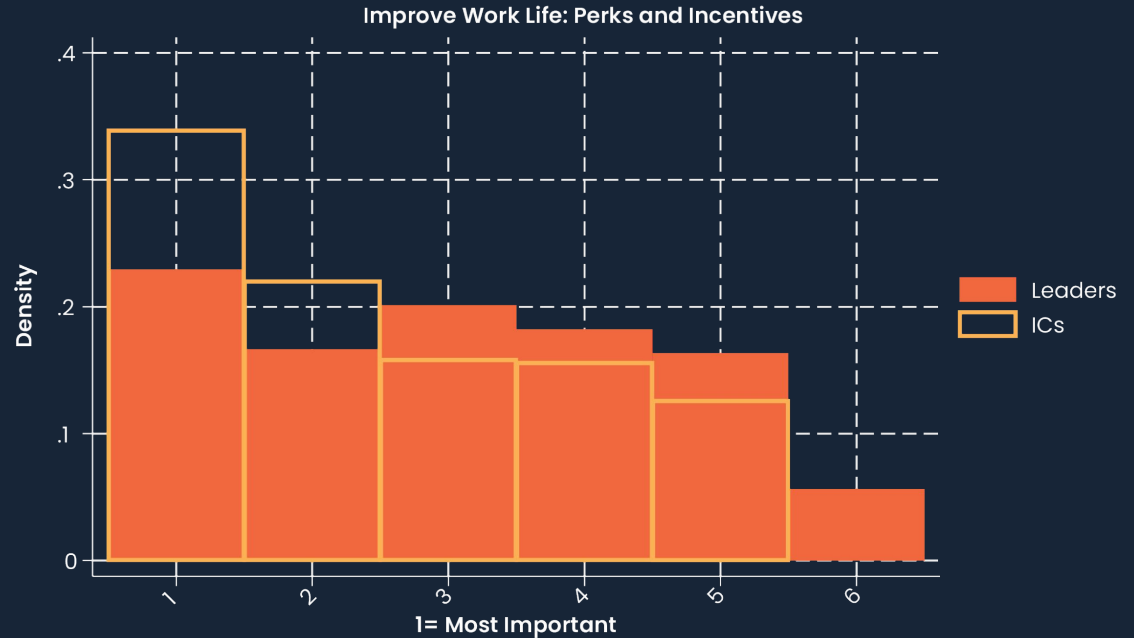


Burnout

Quality of Work Life (cont.)

There is a clear disconnect between what Leaders think their team wants and what their team actually wants.

When instructed to "imagine your company is taking steps to improve life at work for your team; please rank the following in order of their likely positive impact on your team's work life; note that increased compensation has been omitted as it is fairly universal (1 = Most Positive Impact; 6 = Least Positive Impact);" Leaders "think" ICs want to remove repetition but ICs "want" better compensation.

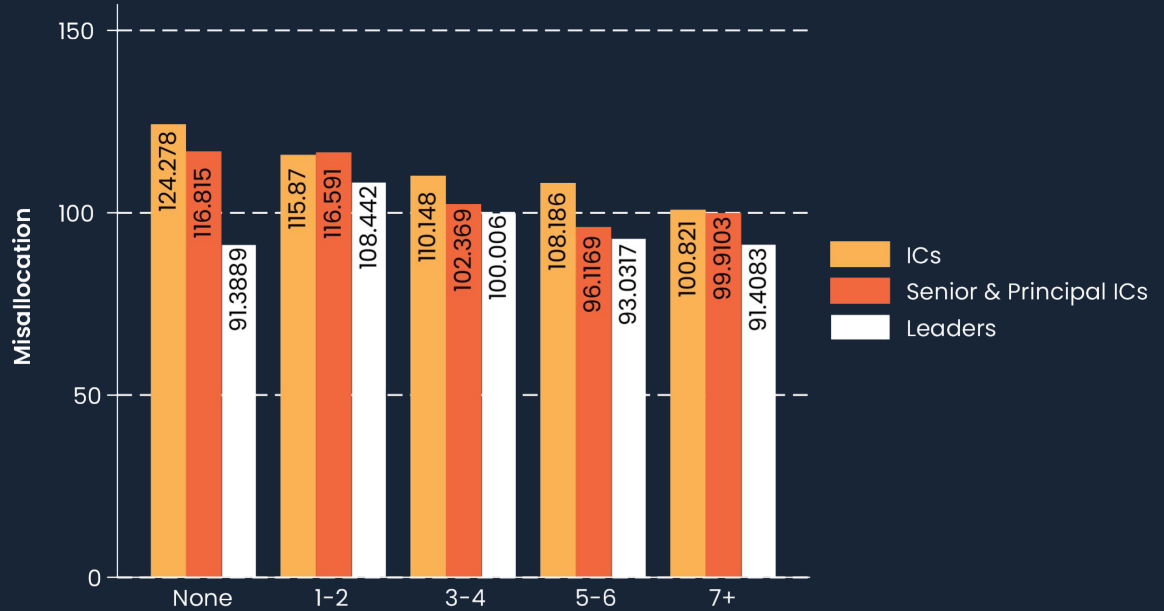


Burnout

Reducing Burnout

Track KPIs more consistently to reduce burnout. Clear KPIs, like "no decision" rates, could provide valuable feedback, reducing the ambiguity and frustration that contribute to burnout. It also empowers teams to pinpoint and reduce time misallocation, thereby streamlining processes and minimizing inefficiencies.

Average Misallocation by Total KPIs





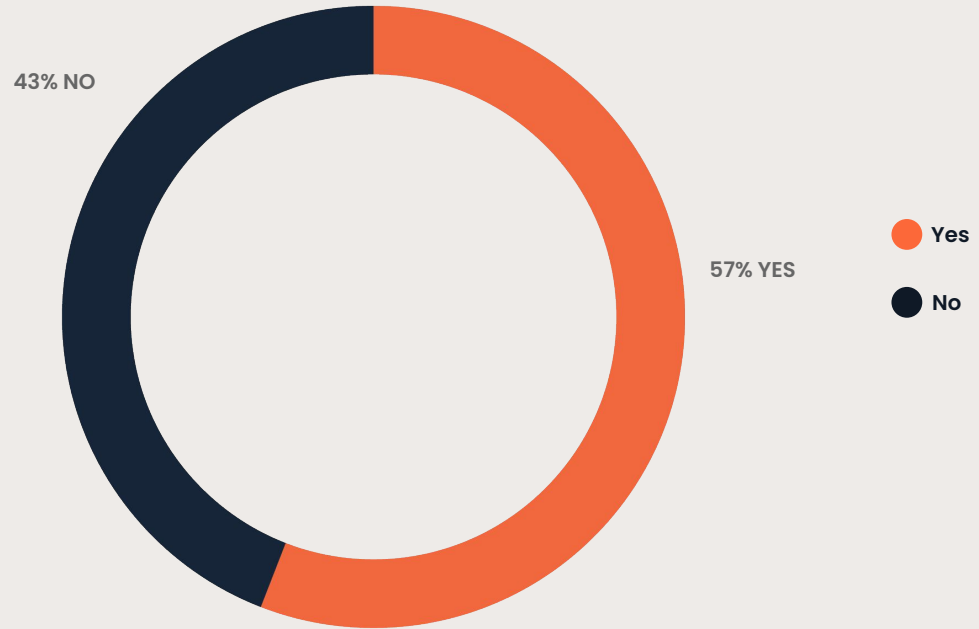
Adoption of Demo Automation

Adoption of Demo Automation

Like last year, the majority of organizations are automating some demo processes.

57% of respondents report automating at least some portion of the demo process.

Does Your Firm Automate?

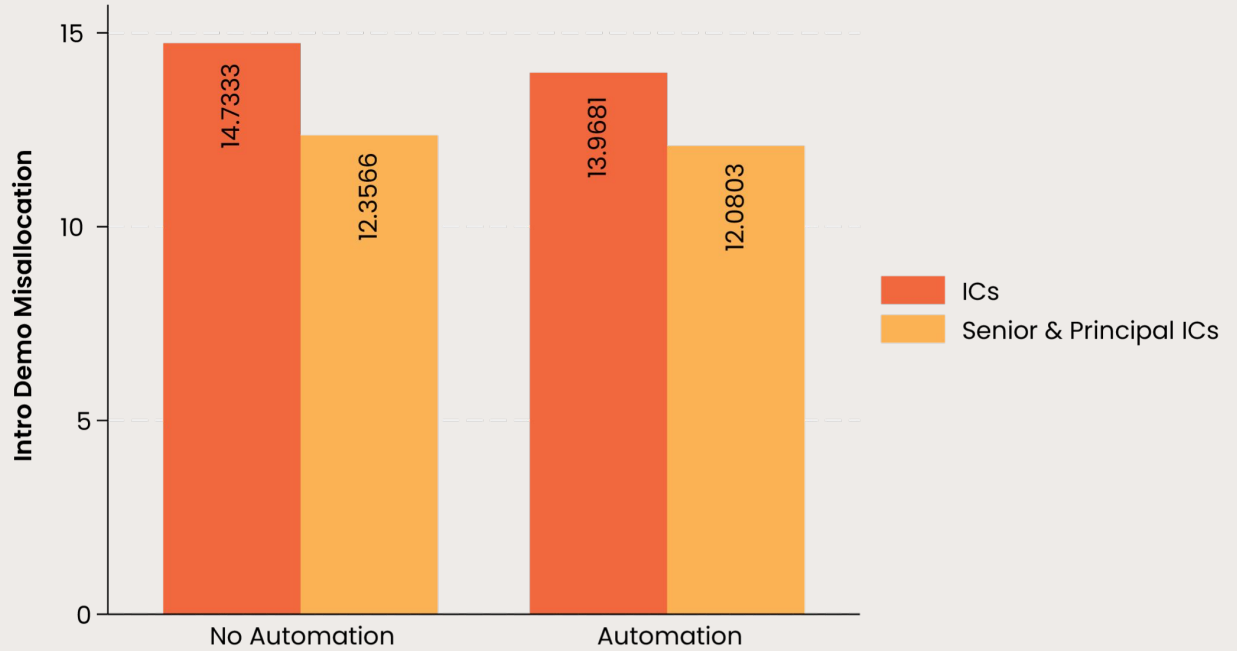


Adoption of Demo Automation

Scaling Presales Resources

Demo automation continues to support higher AE:SE ratios.

Average Intro Demo Misallocation by Automation by Type



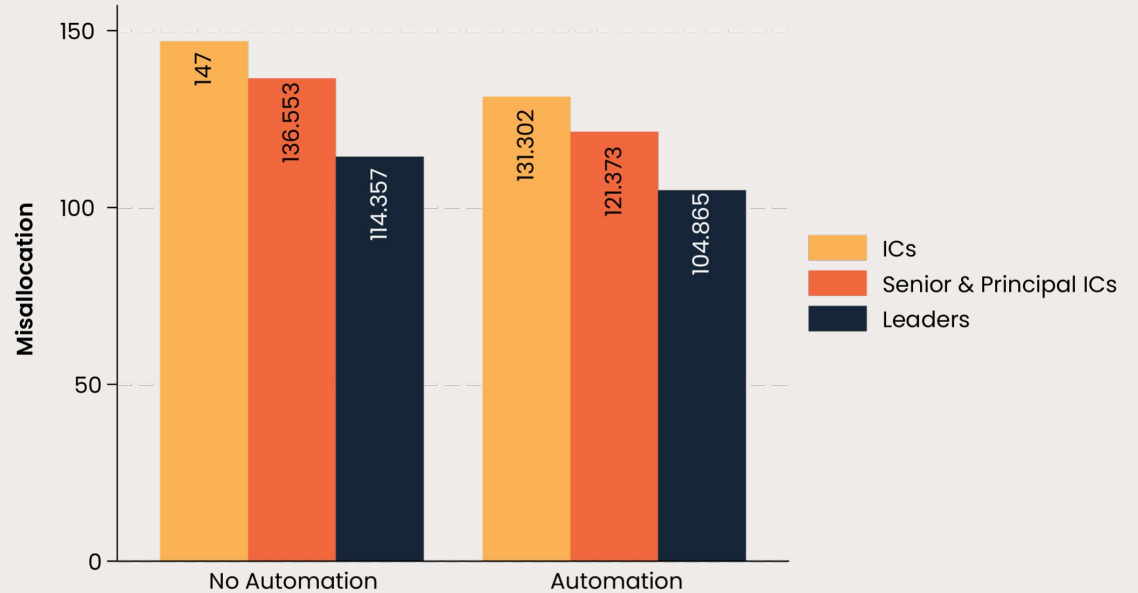
Adoption of Demo Automation

Scaling Presales Resources (Cont.)

Leverage automation to focus on high-impact work.

Implementing automation measures can minimize workload by the equivalent of reducing unqualified demos by 15%. This shift frees up valuable time for ICs to concentrate on high-impact activities that require their expertise and directly contribute to successful outcomes.

Average Misallocation by Automation by Type





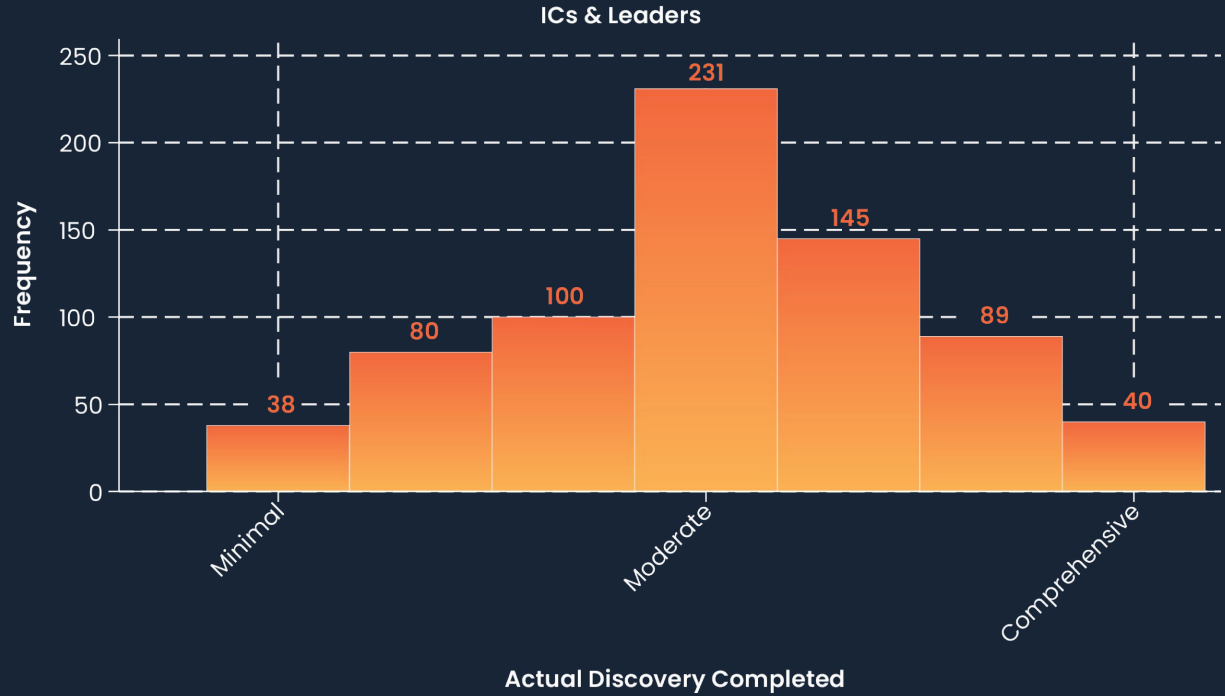
Discovery



Discovery

Actual Discovery Completed

Despite the increasing emphasis on Discovery, over 30% of ICs and Leaders report engaging in less than a "moderate" amount of Discovery.

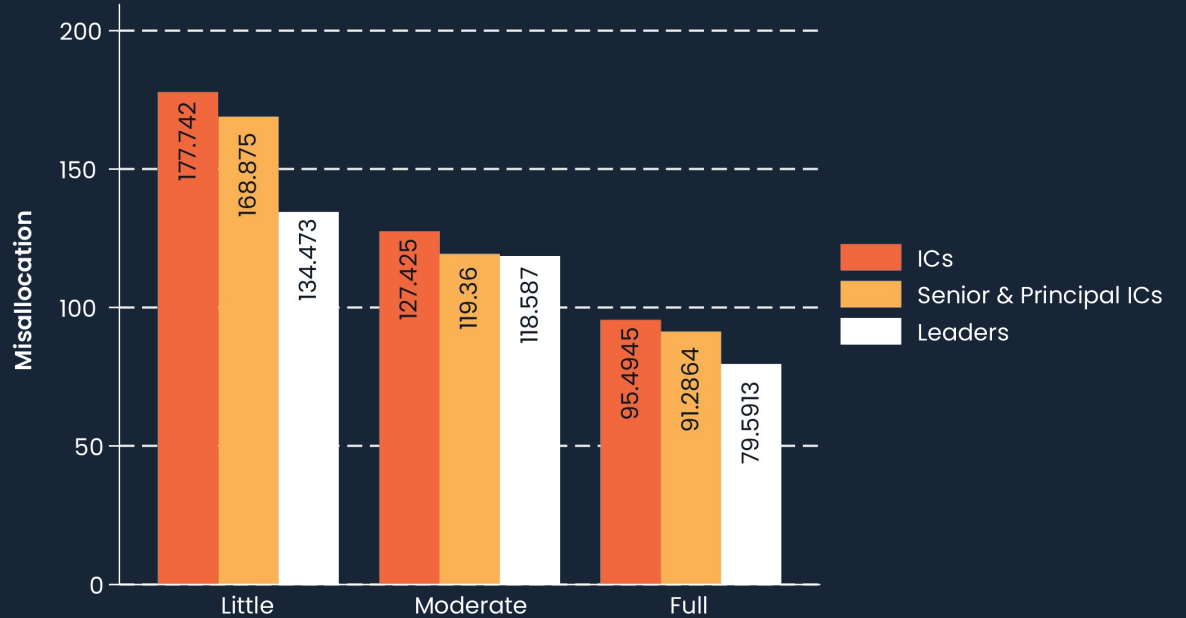


Discovery

The Impact of Discovery

Even when accounting for the impact of unqualified demos, a more thorough discovery phase leads to more effective and potentially less stressful demos. It sets the foundation for understanding customer needs and aligning them with the right solutions, thereby enhancing efficiency and effectiveness in Presales activities.

Average Misallocation by Actual Discovery Performed



Discovery

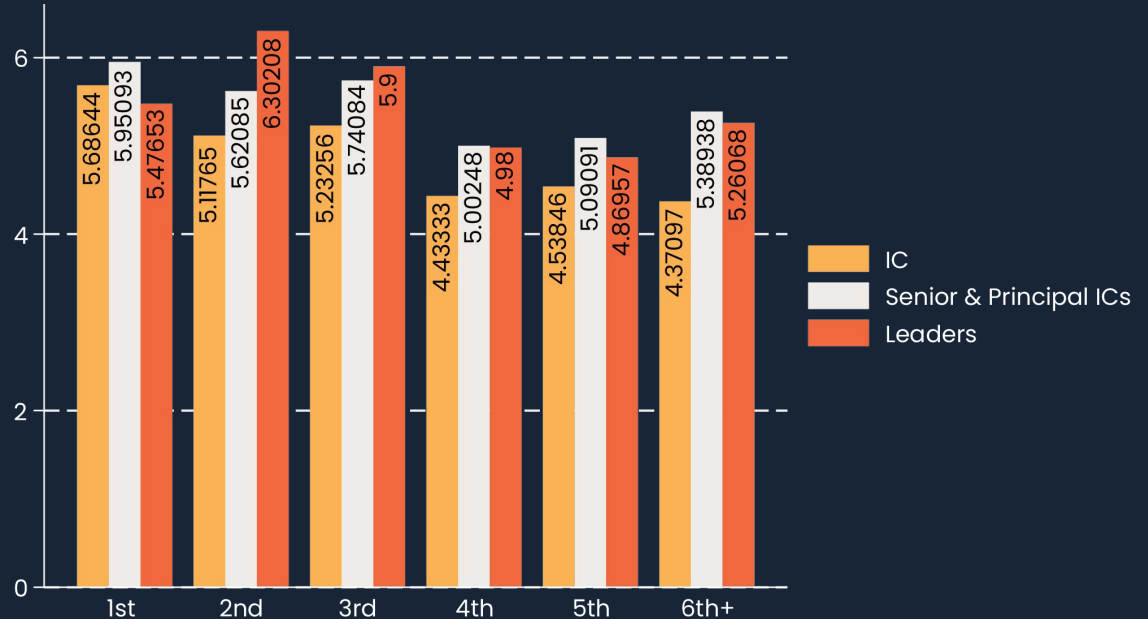
The Impact of Discovery

Enhance the discovery process — it's inversely related to burnout levels.

Respondents with more stakeholders per deal are much more likely to rank Discovery as more important. Proper discovery is the best tool in moving to, or discovering, the next stakeholder.

Longer, more sophisticated (TCV) deals, also typically have more stakeholders. If any one of them can "veto" a sale then the more stakeholders there are then Discovery becomes increasingly more important.

Average Stakeholders to Close by Rank Importance of Discovery



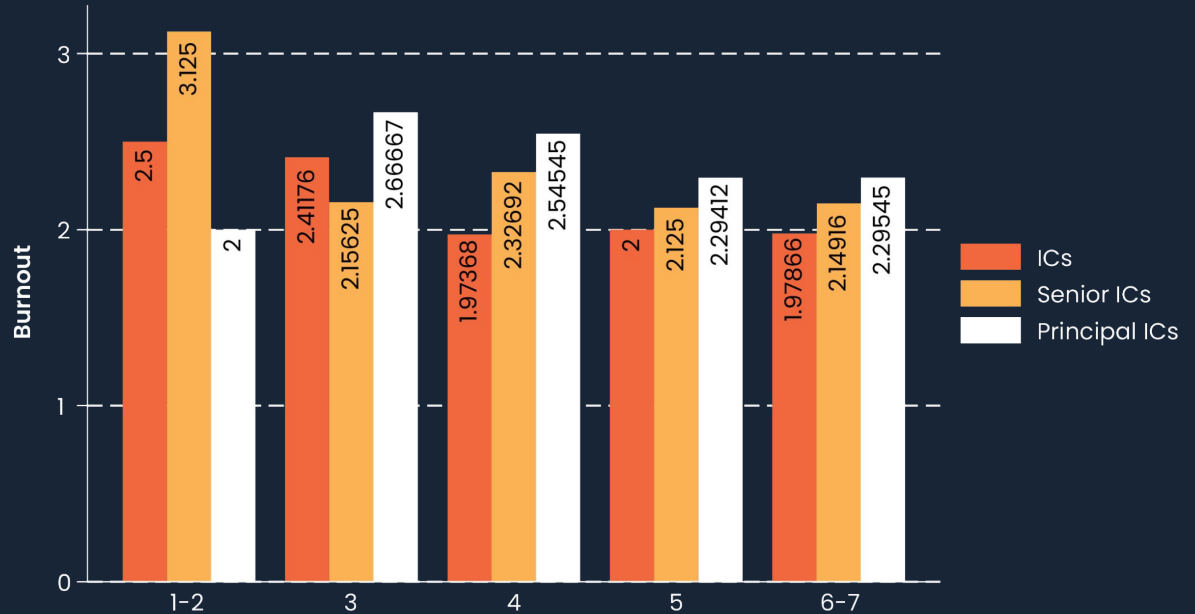
Discovery

The Impact of Discovery (cont.)

Less actual Discovery is linked to higher levels of burnout.

Interestingly, the amount of time spent doing discovery is less important than the actual amount that gets done. This may imply that unqualified demos and actual Discovery are inversely related.

Average Burnout by Actual Discovery (1=little - 7=full)



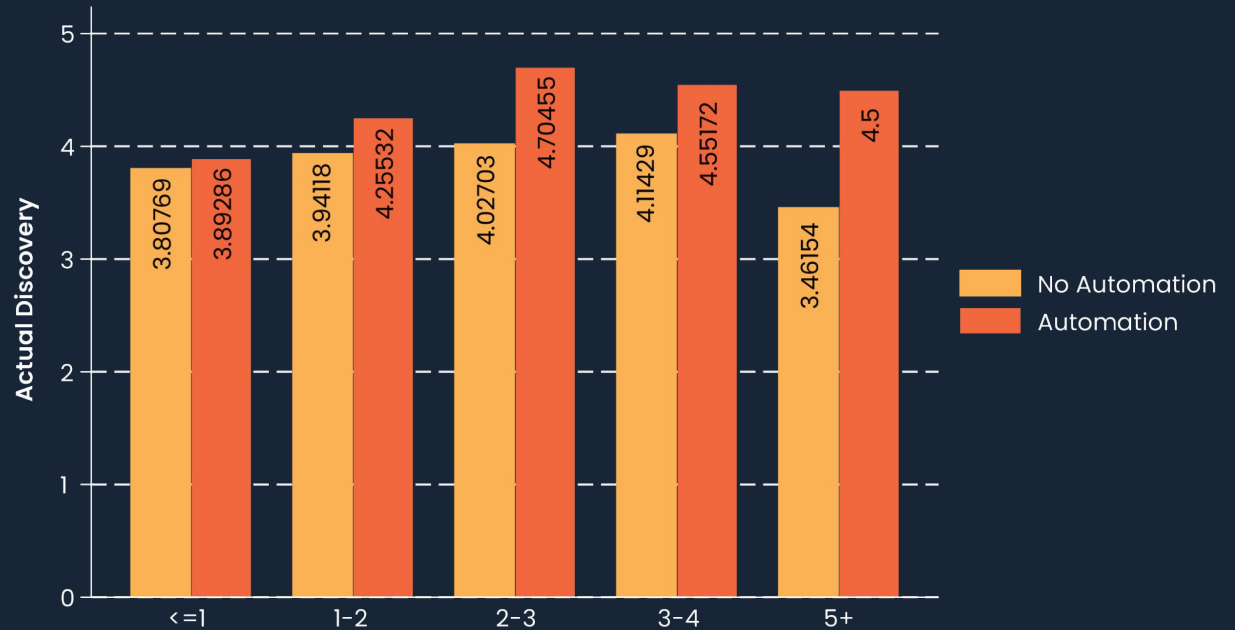
Discovery

The Impact of Discovery (cont.)

Automation helps facilitate more ACTUAL discovery at nearly every level of demo complexity.

Implementing demo automation also facilitates a more efficient discovery process across all durations of demo preparation.

Average Discovery by Man Hours Per Demo & Automation





PREMIUM PRESALES CONTENT

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