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Scaling Sales:

Resource Optimization for Peak Performance

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Your sales team wants to close more deals, build better relationships, and boost those deal sizes. But without the right resources in place, even the best sales strategies fall short. Missed opportunities can cost companies a lot, and it often comes down to the same problem: resource management. Whether your reps lack the right tools, training, or time, poor sales resource planning and management directly impact your bottom line.

Plus, sales leaders often struggle to balance competing priorities. Do you hire more reps, invest in better tools, or adopt strategies to **boost coverage with existing headcount?** Should you focus on training or territory planning? The answers lie in smart sales resource planning and allocation.

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What is Sales Resource Planning?

Sales resource planning maps out exactly how to allocate your sales assets, from people to platforms to budgets. Think of sales resource planning as your roadmap for getting sales reps what they need to close deals faster.

A solid plan connects each resource to specific revenue goals:

- Are your reps wasting time giving live demos to unqualified leads?
- Are they giving demos to the wrong people instead of key stakeholders?
- Or are they spending hours personalizing demos to the wrong use cases?

Sales resource planning eliminates the guesswork so you can make data-driven decisions about where to invest next. This plan starts with a discovery phase in which presales professionals like sales engineers dive into a specific buyer, their industry, their use cases, and their pain points. Lacking these discovery processes can be a hindrance to proper resource planning.

Types of Sales Resources

Your sales resources fall into two categories: what you can touch and what you can't. Physical resources like demo platforms and budgets are easy to track. Intangible assets like expertise and relationships are harder to measure—but just as valuable.

Smart planning makes both work together. When you map them correctly, your close rates improve, your deal sizes increase, and your customers are happier.

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Time

Time is finite. Every minute your reps spend on manual tasks is a minute they're not selling. Plus, endless live demos, unqualified demos, or a lack of stakeholder discovery adds days to your sales cycle. Resource planning helps you cut these delays by identifying exactly where time gets wasted. Want to close deals faster? Start by tracking how your reps spend their hours. Then, automate what slows them down.

Consider the challenges of a live demo. Our research has found that 30% of **all demos are unqualified**, and buyers typically have to wait six to 10 business days before getting a demo—which is even more frustrating when you consider that about 50% of demos cover the same materials.

30%

of all demos are unqualified

50%

of buyers have to wait for more than six business days to get a demo

Consensus' **demo automation technology** allows sales and presales teams to create personalized demos delivered on demand. Buyers get demos that are tailored to their use case, showing off the features they want to see that demonstrate the value of your product, and your team members get back valuable time.

Streamline demo creation with the Consensus Product Experience Platform

Try Now

Onboarding and Training

Onboarding and training sales professionals can be costly and time-consuming. **One recent report** found that it takes an average of 38 days and almost $10,000 to ramp up a new salesperson.

It's worth considering that onboarding and training don't just impact your bottom line—they also impact retention. A survey that looked at the state of sales onboarding found that **47% of sales reps** have left a job due to poor onboarding and training.

Budgets and Incentives

Your budget is your biggest resource—and misspending can be a costly problem. You use your budget on everything from training to tools to recruitment. Clear planning, such as having quarterly sales forecasts and utilizing platforms that track your budget and spending, shows you which investments increase deals.

To help manage your sales budget, make sure to:

- Make at least quarterly sales forecasts
- Have a staff member or multiple staff members oversee the budget
- Utilize software that offers insights, updates, and alerts on your budget to ensure you're on track for meeting your fiscal goals
- Account for emergency funds

It's also important to remember that you're not just investing in platforms and processes—you also need to invest in people. **Our 2025 Sales Engineering Compensation and Benchmarking Report** found that sales engineers said that getting more recognition for their contributions would be one of the biggest motivators for their work. Financial incentives—such as performance-based bonuses, commission structures tied to deal influence, and stock options—can reinforce their impact and keep them engaged. Consider aligning SE compensation more closely with sales outcomes, ensuring they're rewarded for the crucial role they play in closing deals.

Download our free Sales Engineering Compensation and Benchmark Report

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Sales Technology

Your tech stack can help or hurt sales velocity. The right sales tools speed up processes and give reps more selling time. A content management system (CMS) provides easy access to content for revenue teams and creates a central content hub. A customer relationship management (CRM) tool lets revenue teams see the entire lifetime of a customer with your business in one place. An **interactive demo software** enables buyers to explore your product on demand, helping sales engineers focus on high-value engagements.

Other important sales software can include:

- **Sales enablement software:** Provides training, content, information, and other material to all salespeople in your company in one centralized location.
- Learning management systems (LMS): Creates one centralized hub for onboarding and training.
- Sales intelligence platforms: Unearths and unpacks information on potential buyers to help sellers better target buyer needs.
- **Product experience platforms:** Helps with managing, tailoring, and improving the entire experience buyer has with a product.
- Conversation intelligence tools: Listens and records interactions between a potential buyer and a seller and offer insights to improve the sales funnel.
- **AI sales tools:** AI-enabled tools can process data faster than any sales rep can. While AI can't replace your sales team, it can make their job a whole lot easier and save them valuable time. For instance, **Consensus' AI-powered assistant, Claraty,** uses expert knowledge and AI power to support demo discovery and creation.

While a strong tech stack is important, too many platforms could create confusion, with **nearly 70% of sales reps** saying that they're overwhelmed by the number of tools they need to use. Your tech should solve specific problems—like eliminating demo lag time or automating outreach. Focus on solutions that improve the product experience, reduce friction for your reps, and communicate well with one another. A well-integrated tech stack keeps information flowing across your revenue teams, preventing data silos and ensuring that sales reps always have the information they need to properly address the needs of buyers.

Sales Enablement

Nearly

80% of B2B sales

professionals say that sales enablement content is vital when making a sale.

Sales enablement gives your sellers what they need, when they need it, and where they can easily access it. It's more than one resource—sales enablement is the process of making all of your resources accessible, easy to use, and effective.

But if you're not totally sold on sales enablement, consider this: Salespeople who use sales enablement content are

58% more likely

to outperform each year compared to those who don't.

However, more than 30% of sales professionals say that they need more sales enablement content at work and another third say that they need better sales enablement content. While resource planning, it's important to consider dedicating funds to creating and optimizing sales enablement content, such as through investing in a platform with generative AI tools.

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While some sales reps may say they need more content, **Forrester's research** suggests the issue isn't in there not being enough but in a lack of accessibility and alignment. About 65% of sales enablement content goes unused because marketing and presales lack insight into buyer preferences, and sales teams struggle to find it. To maximize its impact, invest not just in content creation but also in training—ensuring presales and marketing craft relevant materials and sales knows how to access and use them effectively.

Sales Resource Management Techniques

Sales leaders need clear methods to manage their resources effectively so they get the most from the presales team. Your team's success depends on how well you deploy people, tools, and time.

Resource Allocation

Start by matching your strongest reps with your biggest opportunities. Then, use automated demos and tools to handle repetitive tasks while addressing the gaps that limit presales capacity. Your reps stay focused on selling while tech handles the routine work. Plus, proper allocation means every dollar spent drives specific results.

Resource Forecasting

Looking ahead saves you from falling behind. Data can show you exactly what your team will need next quarter or next year. When pipeline growth indicates you'll need to automate your demo process, you can find the right software before bottlenecks start. Or consider the fact that nearly 100% of B2B buyers want self-service tools during the buying process. You can give your buyer enablement a boost by providing resources like interactive demos to help them do just that. Smart resource forecasting keeps deals moving without delays.

Resource Leveling

Your sales team performs best when workloads stay balanced. Too many accounts in one territory can lead to missed opportunities. Too few leads to wasted capacity. Move resources where they're needed most through resource leveling, the practice of assessing resource use to find what's being underutilized or misallocated and then redistributing them to a more impactful location. For instance, you can shift demos and content away from quiet territories to support busy regions. Or transfer accounts between reps to maintain steady performance.

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Resource Smoothing

Sales cycles have natural peaks and valleys, but you can smooth out the bumps by adjusting how you use your resources. Resource smoothing lets you adjust the start and end dates of projects and activities to use resources more evenly. Spread out major activities instead of cramming them together, like scheduling training sessions over multiple days instead of doing one big, potentially overwhelming onboarding session. Or, for additional training sessions through an employee's tenure, schedule training during slower periods.

In addition to breaking up training, break up larger projects into smaller, more manageable tasks, assign these tasks to different people to prevent burning out one person, and set reasonable due dates for each task instead of having one large and looming due date. Your team stays productive without getting overwhelmed. And deals keep moving forward at a steady pace.

Best Practices For Managing Resource Allocation

Your sales resources need a clear purpose. Every minute, dollar, and tool affects your bottom line. Transform scattered resources into a strategic advantage with some of these best practices.

1. Prioritize Sales Training

A poor sales training experience causes a dangerous domino effect. A lack of thorough sales training makes a sales rep feel unprepared and unsupported in their role. An unsupported and unprepared sales rep is less likely to meet their quota and more likely to leave the company. This creates additional problems—like other sales reps becoming overworked and overwhelmed and constant hiring and retraining.

Effective sales resource planning can help companies optimize their training time and investments, and, ideally, cut down on this high time and budget. Proper resource planning can show you where the training bottlenecks are and help you choose the right platforms, content, and other tools that expedite the training process.

To further improve your resource allocation, invest in tools that help you not only onboard and train workers but also measure the effectiveness of the training. Check in with your people after sales training to talk about what they learned and what they wish they learned more about to help you optimize training for future workers.

2. Scale with Technology

Notice how we said "scale with technology," not "scale your technology." That's because growing your business isn't about adding more tools—it's about leveraging the right technology to work smarter, not harder. A well-integrated, cohesive tech stack allows your team to handle more opportunities efficiently, optimize workflows, and accelerate sales cycles without increasing headcount.

By automating time-consuming, repetitive tasks—such as scheduling demos, nurturing leads, or qualifying prospects—sales technology frees up your team to focus on high-value activities, like closing deals and building relationships. This not only reduces operational costs but also ensures your existing salesforce can handle a growing pipeline without burnout.

Word of warning: More than **40% of sales reps** say that the hardest part of the job is learning how to use all the tools they need to use to close a deal. Choose tools that are easy to learn to save your sellers time and not eat into the little time they already have.

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3. Develop Career Paths For Your People

Your sales resources may need a clear purpose, but so do your sales professionals. Career development opportunities are what workers today want, and it's ultimately good for your bottom line.

Nearly

70% of workers

say that they would stay with their employer if the company made an effort to upskill them.

As we've already mentioned, training a new worker is a costly endeavor. Retaining employees can keep budgets down, and the best way to retain employees is to invest in their future. But 42% of companies say that they can't find the time to upskill or reskill workers, and 35% say that they can't find the budget. As you plan for resource allocation, include time and budget for not only onboarding and initial training sessions but also training to help more established workers plan for their future.

4. Plan For the Unknown

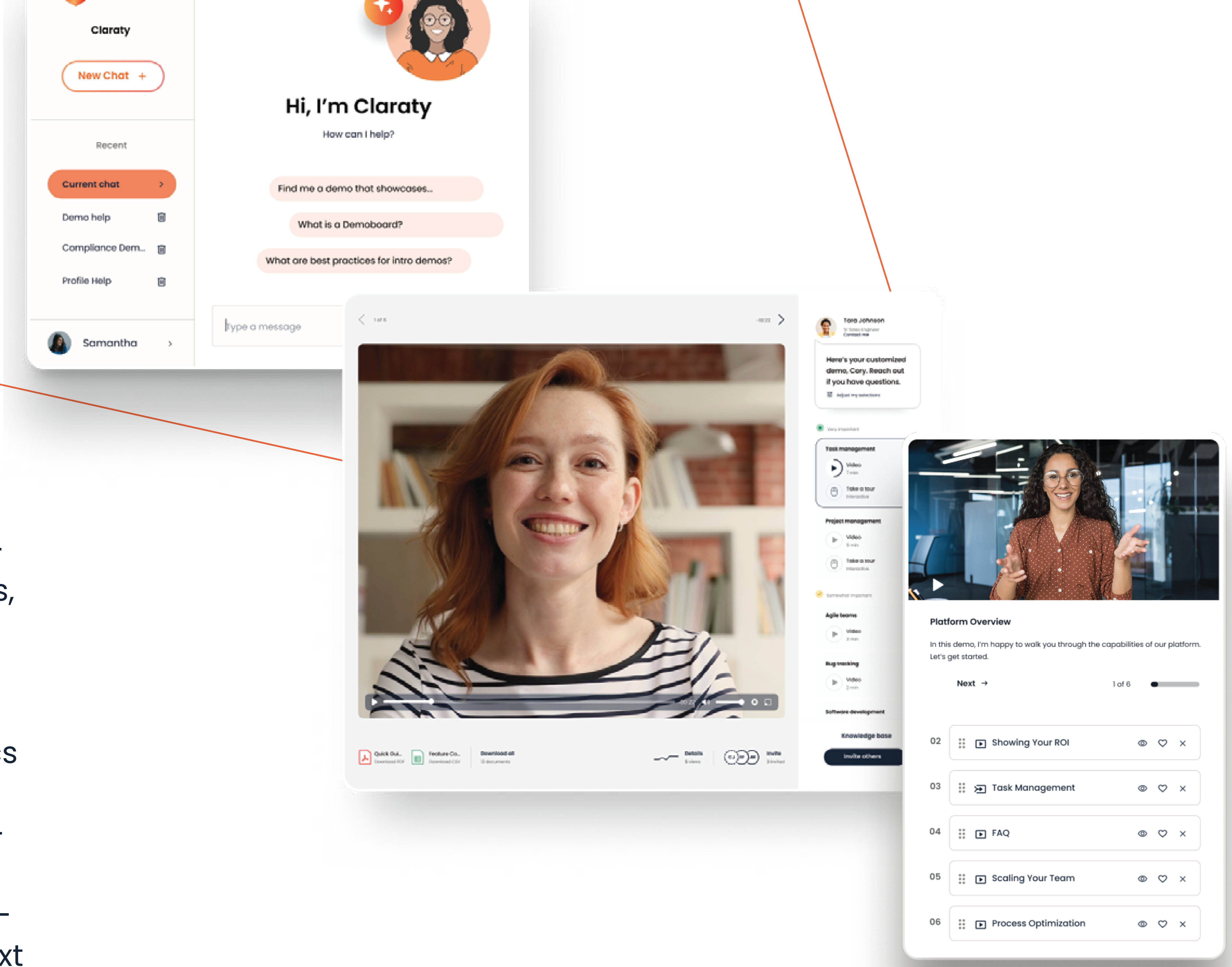
Markets change, deals stall, and budgets shift. Your resource strategy needs built-in flexibility to handle these surprises. When you implement your quarterly sales forecast and prepare your budget, consider adding emergency funds. Use the forecast from previous quarters to predict where you'll need extra support next. When disruptions hit, you'll be ready. Budgeting out emergency funds isn't the only way to plan for the future. It's not possible to know exactly what a potential buyer will say, but it is possible to prepare your sales teams for potential buyer objections. Training to address these objections will make sales reps feel prepared to talk with buyers and get them on board.

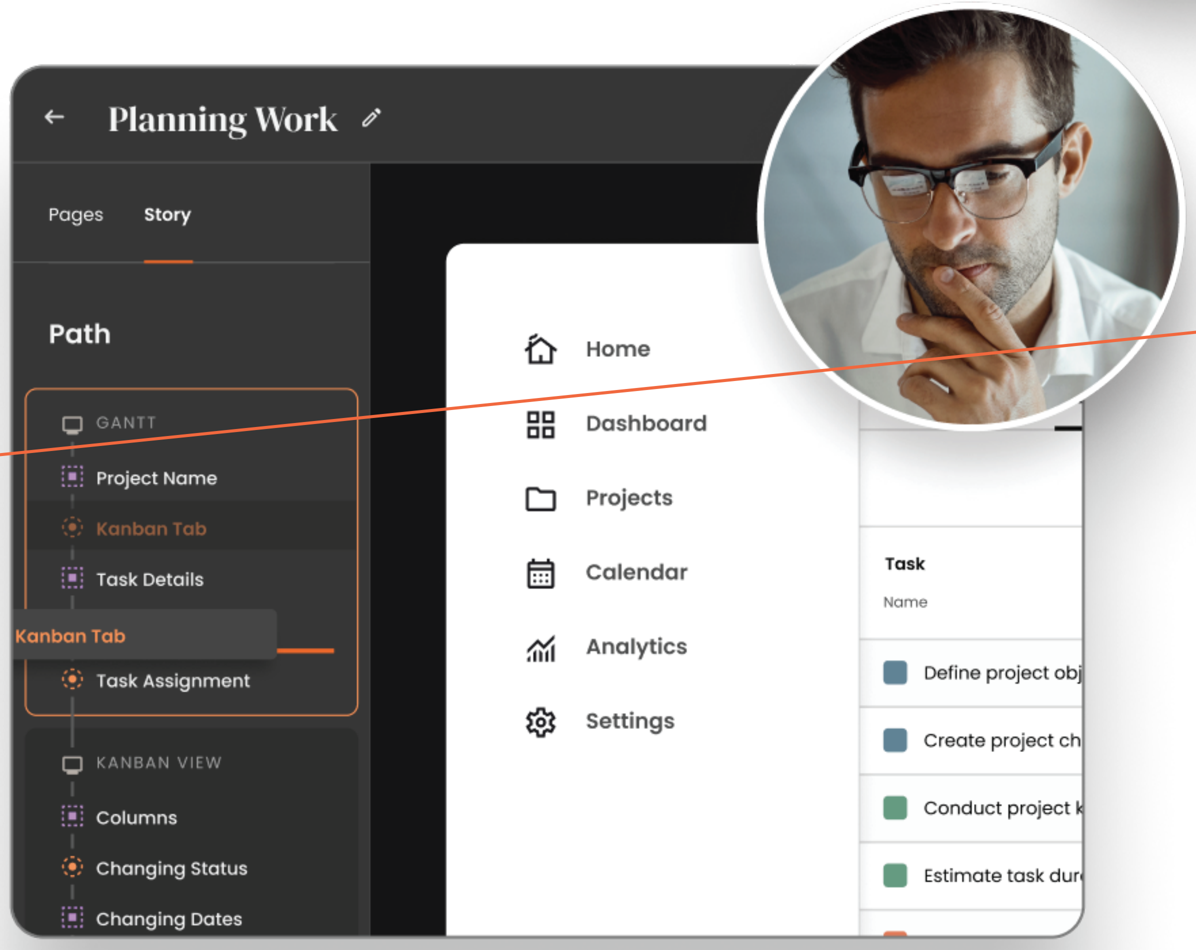
5. Collaborate With Other Departments

Sales teams don't operate alone. Your marketing team needs resources to generate leads. Finance sets your spending limits. Presales gives sales the content, tools, and information they need to close deals, while customer success helps turn new buyers into your forever champions.

Sharing the same technology and tools keeps everything from content to analytics accessible to all revenue teams. Keeping content accessible to all revenue teams prevents it from going unused and from sales feeling like they don't have the support they need from marketing and presales. Sharing metrics, such as on how buyers are interacting with sales enablement content, helps presales and marketing learn what type of content to make next and sales learn what steps to take next to engage a buyer.

Connect with multiple teams while you plan your budget, create training resources, and choose a new tool to ensure that they are useful to everyone to help your whole revenue team become more efficient.





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Benefits of Proper Sales Resource Planning

When you map out exactly how to use every asset—from demo tools to training budgets—you'll see immediate results. Plus, you can stop spending time and money on software and hardware that don't deliver.

Increases Productivity and Efficiency

Sales reps have a lot of tasks on their plate that don't close deals—with research showing that sales reps spend less than **30% of their time** actually selling. More than 70% of their time is full of non-selling tasks, like researching prospects, generating proposals, and internal meetings and training.

Proper resource planning changes that. It helps streamline workflows, eliminates unnecessary tasks, and ensures reps spend more time engaging with prospects. When you give reps the exact tools they need, they can spend more time selling. No more digging through outdated content libraries or waiting days for demo environments to load. You can also use your resources to optimize sales training, giving reps the knowledge and processes they need to succeed rather than having them sit through unrelated, time-consuming training sessions.

Defines Goals and KPIs

Resource planning can help connect every dollar spent to specific revenue targets. Want to know if your new demo platform is working? Track demo completion rates against closed deals. Need a higher training budget? Show how past investments improved win rates. Use resource planning to align spending with measurable outcomes, making it easier to track performance and justify future investments.

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Improves SLAs

Recent research discovered that nearly half of consumers say that they expect a response in less than four hours, with 12% saying that the response time should be 15 minutes or less. But that's hard to deliver without the right support.

Quick responses keep deals moving forward, but if sales reps need to spend hours searching for the right answers and content, how can they respond in just 15 minutes? Resource planning ensures reps have instant access to the right information at the right time. A prospect wants to see your product? Send an automated demo instantly. Questions about implementation? Share a technical deep-dive video. You can enable faster, more informed responses that build trust and move deals forward.

Makes It Easier to Reach Revenue Goals

Resource planning can help eliminate the bottlenecks to help speed up sales cycles. Your team hits targets faster because they're using resources that actually work. Companies that utilize resource planning systems see their operations become more efficient, with 62% of businesses using these systems saying that they reduced costs, shortened process time, and increased collaboration, all significant steps to take to improve ROI. And you'll spot gaps early—before they impact revenue. Sales leaders can shift budgets quickly to support what's working and cut what isn't when they have a detailed look at their resources.

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Set Your Team Up For Success With Sales Resource Planning

Resource planning gives revenue teams the right resources at the right time. No guesswork, no waste—just clear direction on where to invest time and money for maximum impact.

When you're looking for the tools your revenue teams need to close more deals, increase deal sizes, and connect with the right people as a part of your resource planning, you're looking for Consensus. Consensus is the first-of-its-kind **product experience platform**, with the goal of making buying simple, both for sellers and buyers. Your buyers tell Consensus what features they want to see, and the platform can help you customize demos, product tours, and simulations that let them see the true value of your product for their use case. Meanwhile, your sellers get in-depth data that helps them plan for their future resource planning.

Grab our free 2025 Sales Engineering Compensation and Benchmark Report to gain actionable benchmarks and observations and become a disruptive differentiator enabling today's buyers.

Download our Sales Engineering Compensation and Benchmark Report

Introducing Consensus

Consensus is a Product Experience Platform that helps go-to-market teams automate demos, reduce wasted demos from 50% to 5%, and cut demo wait times from 14 days to on-demand—shortening sales cycles by up to 68%.

Get in touch with us to see how our platform helps sales teams like yours crush their revenue goals.

Watch a Demo

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