

Driving growth with an optimized sales coverage strategy



The better the question. The better the answer.
The better the world works.

EY Studio+
Shape the future with confidence

Table of contents

Introduction	1
Customer account segmentation.....	2
Sales roles and organizational structure	6
Customer engagement model	10
Conclusion	13
Meet the team	14

Introduction

In a market with customer expectations, technology and the competitive landscape rapidly changing, re-evaluating an organization’s sales coverage strategy is essential to elevating a sales team’s performance and meeting customers’ needs. Through the sales coverage strategy, an organization’s sales team determines how to go to market by grouping and aligning existing customers and prospective customers to specific sellers to drive sales productivity.

Three key components comprise a robust sales coverage strategy:

1 Customer account segmentation Identify primary value drivers and place customer accounts into discrete segments to be served differentially.	2 Roles and organization structure Determine the necessary sales roles, activities, skill sets and metrics to drive the organization’s future strategy and define the optimal organizational structure.	3 Customer engagement model Define future activities and interactions with the customer throughout the entire sales process.
--	---	--

Organizations reassess their sales coverage strategy for multiple reasons, outlined below, and the subsequent benefits of a reimagined coverage strategy support the strategic objectives of the chief revenue officer (CRO), chief financial officer (CFO) and chief human resources officer (CHRO):

- Drive top-line sales growth.
- Create differential customer experiences and treatments aligning cost-to-serve to the value the customer delivers.
- Standardize processes and roles to create clear internal rules of engagement.

We dive into each component of building a robust sales coverage strategy and the associated leading practices, key considerations and benefits. Additionally, we consider the potential impacts of artificial intelligence (AI) on future sales coverage strategies.

Driving growth with an optimized sales coverage strategy | 1

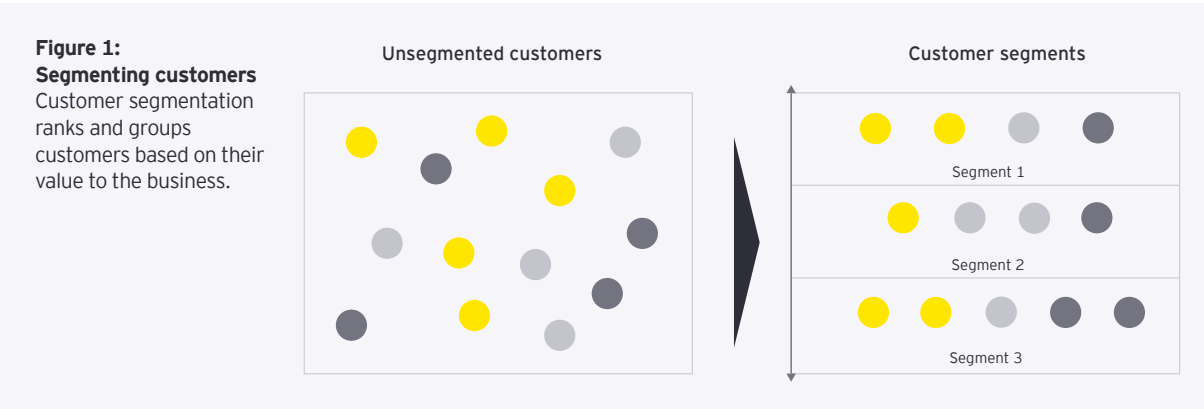


Customer account segmentation

Overview

Customer segmentation creates groups of customers based on similar, measurable criteria and quantifies how valuable that customer is to the organization. Beyond creating discrete groupings of customers, customer segmentation enables organizations to:

- Prioritize allocation of internal resources and service offerings to provide the most value to customers and the business.
- Align business strategy with customer characteristics to support a standardized go-to-market approach and consistent customer experience.
- Better understand customer groups and analyze performance of segments.



Approach

Developing customer segments typically is not a one-size-fits-all approach, though there are leading practices to follow. Determining how many segments, how many customers are assigned to each segment and which metrics to utilize are three important segmentation considerations. To maximize impact, segments should be homogeneous, discrete, substantial, accessible and stable.

Ernst & Young LLP leverages two approaches as a leading practice of account segmentation. The outside-in approach typically includes conducting a customer survey or study to understand robust customer preferences. The inside-out approach leverages quantifiable data to calculate a benefit score that approximates the customer’s value to organizations. Segments are then created by ranking and grouping customers based on their benefit scores.

Until now, the segmentation process has been largely scientific and analytical. Using the benefit scores to determine the number of segments and segment bounds will incorporate business-specific nuances. Again, there’s no right answer, and the segments will depend on the customer population and the needs of the business.

Illustrative approach for the inside-out method:

1

Determine segmentation variables
(e.g., revenue, compound annual growth rate, margin, industry, white space)

- Prioritize the most important variables (a higher number of criteria means each matters less; typically choose five or fewer variables).
- Weight each variable based on relative importance to the business’s future objectives.

2

Gather and compile all necessary customer data and calculate each customer’s percentile ranking across the criteria. In this case, a customer’s rank represents their performance within the variable relative to all other customers. The customer with the highest revenue will be in the 100th percentile, and the customer with median revenue will be in the 50th percentile, and so on.

3

Determine weightings and then apply weights to the corresponding criteria percentile rankings to calculate the benefit score for each customer. The benefit score is a single metric that represents how valuable the customer is to the business.

Implementing customer segments into sales coverage strategy

- With robust and data-backed customer segments, organizations can make informed decisions to drive value with top accounts and optimize cost to serve across the customer journey.
- Coverage strategy determines which roles cover customers in the segmentation model. Top-segment accounts typically warrant a sales role adept at relationship management, strategic partnerships and account planning, while lower-segment accounts warrant a low-touch coverage model, potentially with fewer dedicated resources in a pooled model.
 - Differentiated treatments enable organizations to optimize service offerings based on customer segments. Top-segment customers receive the white glove treatment, while lower-segment customers receive fewer perks due to the transactional nature of the relationship.

The development of differentiated treatments supports CFOs in their efforts to optimize bottom-line cost-to-serve savings and invest in customers that deliver the most value or are expected to deliver the most value.

Figure 2: Examples of differentiated customer treatments

Treatment	Segment 1	Segment 2	Segment 3	Segment 4	Segment 5
Seller	Senior Account Manager (Assigned)	Customer Success Manager (Assigned)	Customer Success Manager (Pooled)	Distributor Manager	Digital Seller or Self-Serve
Account plan	✓	✓	✗	✓	✗
Marketing support	✓	✓	✗	✗	✓
Preferred payment terms	✓	✗	✗	✗	✗
Early access to new products	✓	✗	✗	✓	✗
Channel	Direct	Direct	Direct	Distributor (Indirect)	E-commerce

Impact of artificial intelligence in customer segmentation

- Artificial intelligence (AI) has the potential to take customer segmentation to new heights, given its ability to analyze vast amounts of data and produce key insights.
- AI algorithms can identify key patterns and needs beyond traditional financial or geographical elements to predict behavior of customers, such as likelihood to purchase, responses to marketing campaigns and customer preferences. This enables hyper-personalization for customers by creating segments based on the individual customer preferences and identifying differentiated customer treatments within each segment. AI can also provide insights for potential adjusted treatments for customers based on the specific needs of the customer at that moment (e.g., intelligent routing based on likelihood of success). Finally, AI can formulate segments in real time, as opposed to conducting a new analysis every three to six months.
- Based on a recent study by Salesforce, AI improves segmentation accuracy by ...

74%

Source: "What is market segmentation?" Salesforce website, accessed 1 May 2025, <https://www.salesforce.com/marketing/segmentation/>

This statistic highlights the growing adoption and effectiveness of AI in segmentation. In turn, improved segmentation can lead to increased sales effectiveness through campaign targeting that better meets customer needs, thereby driving increased sales.

Key takeaway

Whether seeking to drive growth at top accounts, right-size cost to serve with transactional accounts or better understand customers, segmentation is valuable for organizations looking to strengthen commercial operations. As sales organizations continue to shift toward account-based and customer-centric business models, segmentation provides a useful framework to rapidly evaluate customers and adjust offerings that benefit both the customer and the organization. Customer segmentation serves as a key element of an organization's sales coverage strategy, as it prioritizes the existing customers and creates differential treatments per segment.



Sales roles and organizational structure

Overview

Since the pandemic, the way customers engage with and buy from B2B organizations has dramatically changed. E-commerce portals and other digital tools are table stakes, and the need for sellers to effectively sell virtually is more pressing than ever before.

Beyond the shifts of selling to customers, organizational changes such as mergers, acquisitions and internal restructurings increase the need to redefine and standardize sales roles across the organization. Common pain points that organizations experience in sales roles include:

- Lack of focused responsibility (e.g., selling across too many products, selling to different types of customers, mix of retention and new business acquisition)
- Significant amount of time on administrative tasks and internal meetings instead of customer-facing sales activities
- Assumption that good sellers will make good managers; natural sellers may progress throughout the organization as sellers and not people managers

Sales roles and organizational structure

Key considerations for designing sales roles for a future-state sales organization

Developing sales roles with clear responsibilities, skills, metrics and key performance indicators (KPIs) is critical to support an organization’s growth ambitions.

The level of detail and precision assigned to crafting sales roles will help each member of the sales team to be strategically positioned to drive success within the organization.

- Clearly defined roles will remove uncertainty around responsibilities and increase overall efficiency.
- By identifying the necessary skills for each position, an organization can target potential candidates with more intention and develop learning and development materials tailored to improve the skills of its people.
- Metrics and KPIs provide a framework to measure performance, hold team members accountable and enable the organization to track progress.

Defining clear roles and responsibilities can benefit the CHRO agenda by boosting employee satisfaction and productivity.

When designing new sales roles, keep the following considerations top of mind:

				
1 Growth-oriented future Roles are defined based on what's needed to serve the future business needs and expected growth aspirations.	2 Discretion and clarity Role accountabilities, responsibilities, skill requirements, and metrics are clearly documented and consistently understood.	3 People-agnostic skills Roles are defined based on the skills needed, not the existing skills people have.	4 Codevelopment Role responsibilities, skills assessment review and resource alignment should consider sales leader and direct sales manager input.	5 Minimal customer disruption When aligning individuals to roles and books of accounts, aim to minimize account transitions among highest-value customers.

There are three illustrative sales activities that sellers can be classified under: **hunting in the wild**, **hunting in the zoo** and **farming**. Sales roles can be assigned to focus on a specific bucket; however, there is an art to having a variation of these buckets exist within a sales role or roles. This will be determined based on the skill sets needed for the future-state sales organization.

Figure 3: Types of sales activities

Hunting in the wild	Hunting in the zoo	Farming
▪ Hunting in the wild focuses on building relationships with new customers, selling both new and existing products. ▪ Hunting in the wild requires aggressive prospecting, relationship building and closing capabilities.	▪ Hunting in the zoo focuses on building relationships and growing the business at existing customers by selling new products, driving strategic price increases and increasing the client’s share of wallet. ▪ Hunting in the zoo emphasizes the importance of strong, trusted customer relationships.	▪ Farming focuses on retaining business from existing customers and their existing products. ▪ Farming requires minimal prospecting or other business development skill sets, though it may help qualify leads for roles with hunting activities.

Sales administrative tasks

Impact of generative and agentic AI in sales roles

Generative AI (GenAI) produces highly personalized and context-sensitive artifacts based on historical customer and stakeholder information. As GenAI adoption continues to grow, it is likely to change future sales roles.

It’s able to support many administrative sales tasks, such as customer research, generating new proposals, producing key insights (e.g., cross-sell suggestions) and creating quotes, thereby enabling sales professionals to focus on customer-facing, revenue-generating activities. Based on a recent study by Gartner, it’s estimated that by 2028, 60% of B2B seller activities will be executed through conversational user interfaces via GenAI technologies (up from less than 5% in 2023).¹ This indicates that GenAI will become a core part of most sales processes within the next few years.

Agentic AI has also recently emerged. The key difference between agentic AI and GenAI is agentic AI’s ability to make decisions automatically without any human intervention. This is done by anticipating future outcomes and taking an autonomous action based on real-time data and learning behavior. Agentic AI is also expected to impact sales roles, expanding a Salesperson’s current scope and reach beyond today’s current capacity limitations. For example, leveraging agentic AI to serve as a sales support professional for smaller customers that fall within the “farming” sales motion provides a more cost-effective method to interact with these customers, while also proactively identifying potential issues.

1 “Gartner Expects 60% of Seller Work to Be Executed by Generative AI Technologies Within Five Years,” *Gartner website*, 21 September 2023, <https://www.gartner.com/en/newsroom/press-releases/2023-09-21-gartner-expects-sixty-percent-of-seller-work-to-be-executed-by-generative-ai-technologies-within-five-years>.

Key considerations for designing the sales organization structure

When determining the sales organization structure of the future, there are various design decisions to consider. While there are many ways to structure a sales organization, the most common ways are sales motion, region, customer type and product type.

Organizations tend to have a hybrid of these characteristics to best fit their sales process and growth ambitions.

It is also important to consider preserving the areas of the organization that are currently outperforming targets while optimizing or changing other areas that are not performing as well. For both roles and organization structure, it is important to keep career trajectory and employee culture at the forefront.

Consider the following guiding principles when designing the future sales organization structure:

- **Scalability**
Design the organization with flexibility and adaptability to growth and change without requiring a reorganization.
- **Standardization and consistency**
Implement uniformity across the organization to maintain consistency across the sales process.
- **Accountability**
Ensure team members are responsible for their performance against the organization’s goals.
- **Customer-centricity**
Continue to prioritize customer needs and expectations to drive customer satisfaction and long-term business relationships.
- **Healthy collaboration and competition**
Foster an environment where team members are encouraged to work together while promoting a competitive mindset that drives continued growth.
- **Employee performance and culture**
Celebrate high performance and improvement across the organization, and support employee development and wellbeing.

Key takeaway

Effectively defined sales roles with clear activities, skill sets and KPIs will create a high-performing sales team to execute on the organization’s commercial strategy. These roles are typically aligned to specific customer segments to differentiate internal resources and drive efficiency within each customer segment. An optimized organizational structure will provide the proper level of leadership and support to the sales organization to meet organizational objectives.



Customer engagement model

Overview

A customer engagement model (CEM) is like a layer cake. It is a framework developed layer by layer to build a customer-centric, detailed and standard model to help establish the sales process design. It places customer experience at the forefront and aligns the organization on the customer persona(s) and journey(s) from pursuit through continued relationship management.

The EY Customer Engagement Model refocuses cross-functional teams (sales and supporting teams) on how to interact with prospects, customers and partners at every touch point to provide experiences that are simple, seamless and drive growth.

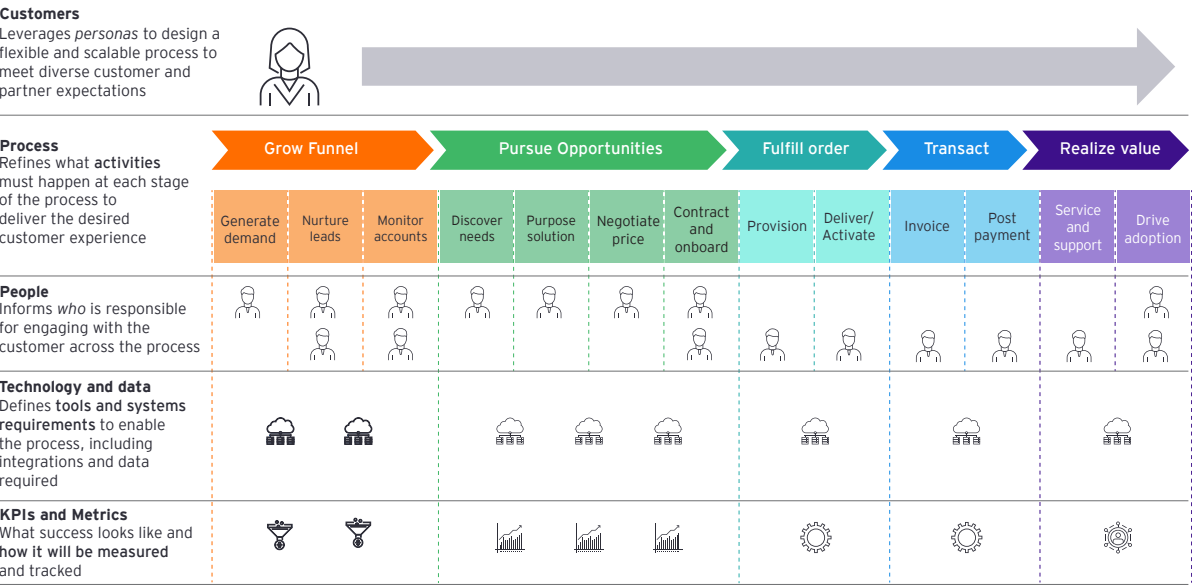
The sales motion (e.g., B2B, B2B2C) determines the CEM's focus. In a B2B sales strategy, the emphasis is on building long-term, strategic relationships with business clients, while B2B2C models include the end consumers of the products or services, requiring a more integrated approach. B2B2C CEMs

balance interactions with business clients while maintaining a focus on the experience of the end users. A multichannel approach is essential to cater to both business and consumer personas.

Regardless of the business model, CEMs prioritize both customer and employee experiences. While process and technology are important contributors to a successful model, the emphasis on the customer and employee experiences is key. Without this focus, there is no effective customer engagement model.

Customer engagement model

Figure 4: The EY Customer Engagement Model: integrating people, process, technology and data for transformation



Key components

CEMs should include sales stages specific to an organization's sales motion with customers, with each stage having specific activities and exit gates required to reach the next stage.

Future rules of engagement are established within a CEM to detail which team members are involved in each activity, how they interact with each other, and how team members transition the interaction and/or account to the next stage.

CEMs standardize sales motions, providing on the CRO agenda to make the sales team more efficient and provide a consistent customer experience.

Key components in the EY Customer Engagement Model are:

- **Customer personas and journeys:** These help to dictate what outcomes and experiences the customer expects in moments that matter.
- **Process:** This refines what actions must happen internally to provide the desired customer experience. To do so, outline the customer expectations and internal activities to support them.
- **People:** This informs who is responsible for engaging with the customer across their journey.
- **Technology and data:** These define what methods, tools and activities are used or performed and the necessary data required.
- **KPIs and metrics:** These define what success looks like at each stage of a CEM.

Leveraging a CEM

Implementing a CEM helps an organization to prioritize the customer’s experience, so that every interaction is designed to meet their specific needs and preferences.

Leveraging a CEM in a redesigned coverage model helps sales teams to redefine roles and responsibilities, standardize processes, and clearly articulate who is responsible at each stage of the customer’s journey. It also helps other functions to understand their roles and responsibilities within the selling motion and create a cohesive customer experience.

The CEM serves as the main reference point for the organization to understand the sales process, including the defined stages, activities and exit gates. This structured approach will promote a more efficient and effective sales cycle. Combining the CEM with robust customer segmentation and redefined sales roles and organizational structure brings to life the full coverage strategy.

Impact of AI in the CEM

Similar to customer segmentation and sales roles, AI has the potential to significantly impact sales processes and how sellers engage with customers via the CEM in the future.

One example is using AI to systematically score a lead for a sales rep to consider pursuing. The Harvard Business Review recently reported that AI can reduce the overall sales cycle duration by up to 20%,² indicating key changes to internal sales processes and external engagement with customers by leveraging AI.

2 Chung, Doug; Plotkin, Candace Lun; Sarvari, Siamak; Stanley, Jennifer; and Maria Valdivieso, “5 Gen AI Myths Holding Sales and Marketing Teams Back,” *Harvard Business Review*, 21 February 2025, <https://hbr.org/2025/02/5-gen-ai-myths-holding-sales-and-marketing-teams-back>.

Conclusion

A sales coverage strategy combines customer segmentation, sales roles and organization structure, and the customer engagement model. Simply put, it allows an organization to strategically assign customers to segments, segments to roles and roles to people, culminating in the organization’s full go-to-market approach. At the most detailed level, it also assigns specific customers and prospects to an individual salesperson to create their specific book of business.

Summary of the components of a sales strategy:

1 Customer segmentation This creates actionable groups of customers for the organization to prioritize resources and offer differential treatments.	2 Roles and organization structure Standardized roles and responsibilities drive desired outcomes along with a leadership structure designed to provide the most effective support.	3 Customer engagement model This defines future activities and interactions with the customer throughout the entire sales process.
---	---	--

Whether an organization is looking to maximize revenue growth, streamline operations or reduce cost to serve, conducting a sales coverage transformation is a key enabler to help achieve these benefits.



Meet our Ernst & Young LLP thought leaders



Duncan Avis

EY Studio+ Americas Leader,
Global Marketing Transformation
Solution Leader
Ernst & Young LLP
duncan.avis@ey.com



Brian Goonan

EY Studio+ US Sales
Transformation Solution Leader
Ernst & Young LLP
brian.goonan@ey.com



Mike Milosevich

EY Studio+ Sales
Transformation Team
Ernst & Young LLP
michael.j.milosevich@ey.com

Andrew Bell and Josh Waddell, Sales
Transformation Senior Consultants in EY
Studio+ at Ernst & Young LLP, contributed
to this article.

EY | Building a better working world

EY is building a better working world by creating new value for clients, people, society and the planet, while building trust in capital markets.

Enabled by data, AI and advanced technology, EY teams help clients shape the future with confidence and develop answers for the most pressing issues of today and tomorrow.

EY teams work across a full spectrum of services in assurance, consulting, tax, strategy and transactions. Fueled by sector insights, a globally connected, multi-disciplinary network and diverse ecosystem partners, EY teams can provide services in more than 150 countries and territories.

All in to shape the future with confidence.

EY Studio+ creates transformative experiences that move people and shape markets. Our solutions work at the intersection of creative design and commercial insight, powered by cutting edge technology – to drive real business value in a captivating way. We reimagine customer centricity and shape new possibilities at scale, drawing on EY's full spectrum of services, sector insights and diverse ecosystem partners. EY Studio+ consulting services related to front office transformation are an offering by a number of EY member firms across the globe. For more information, please visit studio.ey.com

EY refers to the global organization, and may refer to one or more, of the member firms of Ernst & Young Global Limited, each of which is a separate legal entity. Ernst & Young Global Limited, a UK company limited by guarantee, does not provide services to clients. Information about how EY collects and uses personal data and a description of the rights individuals have under data protection legislation are available via ey.com/privacy. EY member firms do not practice law where prohibited by local laws. For more information about our organization, please visit ey.com.

© 2025 EYGM Limited
All Rights Reserved.
EYG no. 006405-25Gbl

ED None

This material has been prepared for general informational purposes only and is not intended to be relied upon as accounting, tax, legal or other professional advice. Please refer to your advisors for specific advice.