

Drive Frontline Sales Productivity With an AI-Powered Seller Action Hub

15 May 2024 - ID G00800202 - 10 min read

By: Dan Gottlieb, Adnan Zijadic, Guy Wood, Sandhya Mahadevan

Initiatives: [Sales and Revenue Technology](#)

Sales organizations struggle to create value from AI tools and methodologies due to a lack of understanding of seller workflow at the action level. This research can help CSOs enhance frontline productivity strategy using an AI-focused Seller Action Hub.

Overview

Key Findings

- Due to the outsize potential of AI and the hype surrounding it, the stakes for making smart AI decisions are high for chief sales officers (CSOs), necessitating their involvement in sales technology design.
- Few sales technology teams understand frontline seller work at the granular level to make optimal AI design choices. This lack of understanding can lead to a disconnect between the technology sales teams use and their operational needs.
- Decisions about how to incorporate AI into the sales process are often influenced by vendors and IT teams who may lack comprehensive knowledge of nuanced sales actions within a specific sales organization.

Recommendations

- Drive informative conversations using the concept of sales actions with your sales technology and frontline sales leaders to understand the impact of AI on quota-carrying roles.
- Direct your sales tech teams to assess your tech stack's support for sales actions across all five layers of Gartner's Seller Action Hub: engagement, action, insight, collaboration and visibility. This strategy will yield a comprehensive understanding of your current state and simplify discussions about opportunities for improvement.
- Commission a discovery and findings analysis effort to review the roles of sales actions for strategic planning, technology adoption or new initiatives. Use diagnostics, such as a Seller Time Spend Assessment, to provide critical inputs to this effort.

Strategic Planning Assumptions

- By 2025, more than 80% of sales tech vendors will embed generative AI (GenAI) capabilities into their enterprise applications, up from less than 20% in 2024.
- By 2028, 60% of B2B seller work will be executed through conversational user interfaces via GenAI sales technologies, up from less than 5% in 2023.

Introduction

With 87% of sales leaders reporting a top-down push from CEOs and boards to implement GenAI, the CSO is newly tasked with guiding leadership teams to make smart AI decisions. ¹ Decisions can be skewed by vendors and IT teams who may not fully comprehend the complexities of frontline sales. Vendors may sway your teams with ambitious AI promises, while IT teams may conduct AI workshops without fully understanding the sales process. Navigating the complexities of AI requires a nuanced grasp of how sales actually works. Enter: actions.

Actions: The granular units of work required to make optimal AI design choices. Not enough sales technology teams understand seller workflow at the level of granularity needed to make optimal AI design choices.

When CSOs see AI's effect on the complex aspects of daily sales work, they recall their own experiences navigating intricate work to excel in their careers. These experiences often make them hesitant to deploy AI, and instead use traditional methods for growth, like adding headcount. CSOs remember the unstructured and highly detailed actions of frontline sales workflows, like the complexity of following up a sales call or the pain of gathering internal stakeholders to make a decision for a big deal. They remember actions. CSOs can ask their technology teams one question to scale their intuition and unlock the benefits of AI: How does AI affect frontline sales *actions*?

Seller Action Hub

Gartner's Seller Action Hub is a tech stack design philosophy that encourages a frontline-centric approach to AI tech stack design. In this philosophy, the needs and workflows of the sales team drive the tech stack, rather than vendors' capabilities.

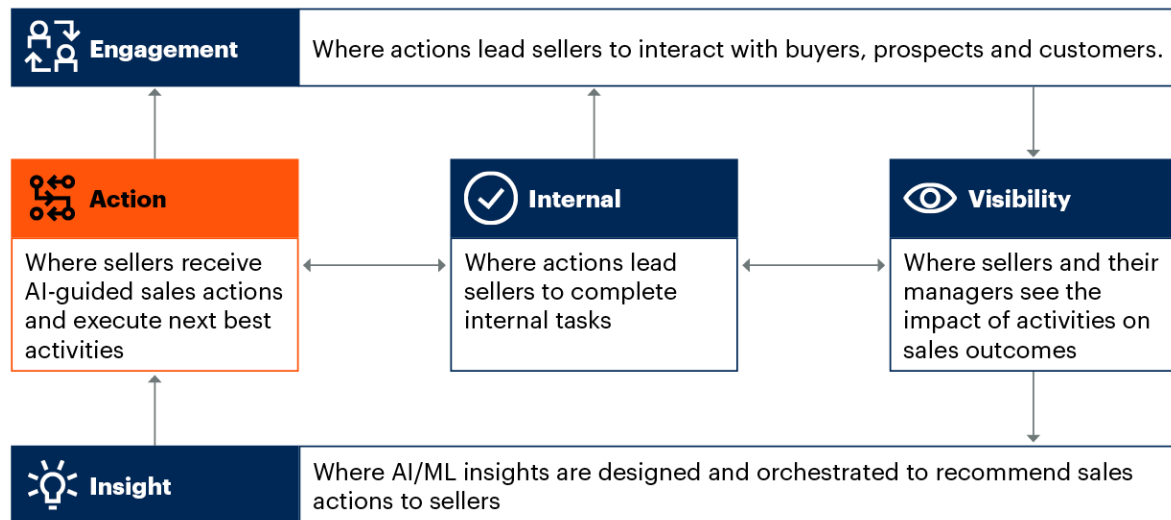
The Seller Action Hub guides sales technology teams to make optimal AI design decisions following three tenets (see Figure 1):

- Understand sales at an action level to pinpoint where AI can enhance or automate tasks.
- Recognize that different sales roles often require different actions and technologies.
- Integrate AI to augment or automate specific actions of frontline sales work.

To drive frontline productivity with AI, use this philosophy to engage vendors and IT with questions that lead to an integrated sales tech experience. If you do this, you will find the right balance between being grounded in reality while also building a future-oriented business.

Figure 1: Seller Action Hub

Seller Action Hub



Source: Gartner
800202_C

Gartner

Analysis

Drive Informative Conversations About Sales Actions to Understand AI's Impact on Roles

Actions, the units of work at the necessary level of granularity that enable smart AI design choices, are the building blocks AI uses to execute sales work. The swift progression of AI in sales technology, including GenAI and large language models (LLMs), rapidly increased the types of actions AI can assist with. Tasks GenAI can support, like synthesizing information, writing content, answering questions, editing for tone and simplifying information are part of far more complex selling workflows. By understanding actions, and how AI can assist, technology teams can make more flexible and adaptable use of AI throughout the organization.

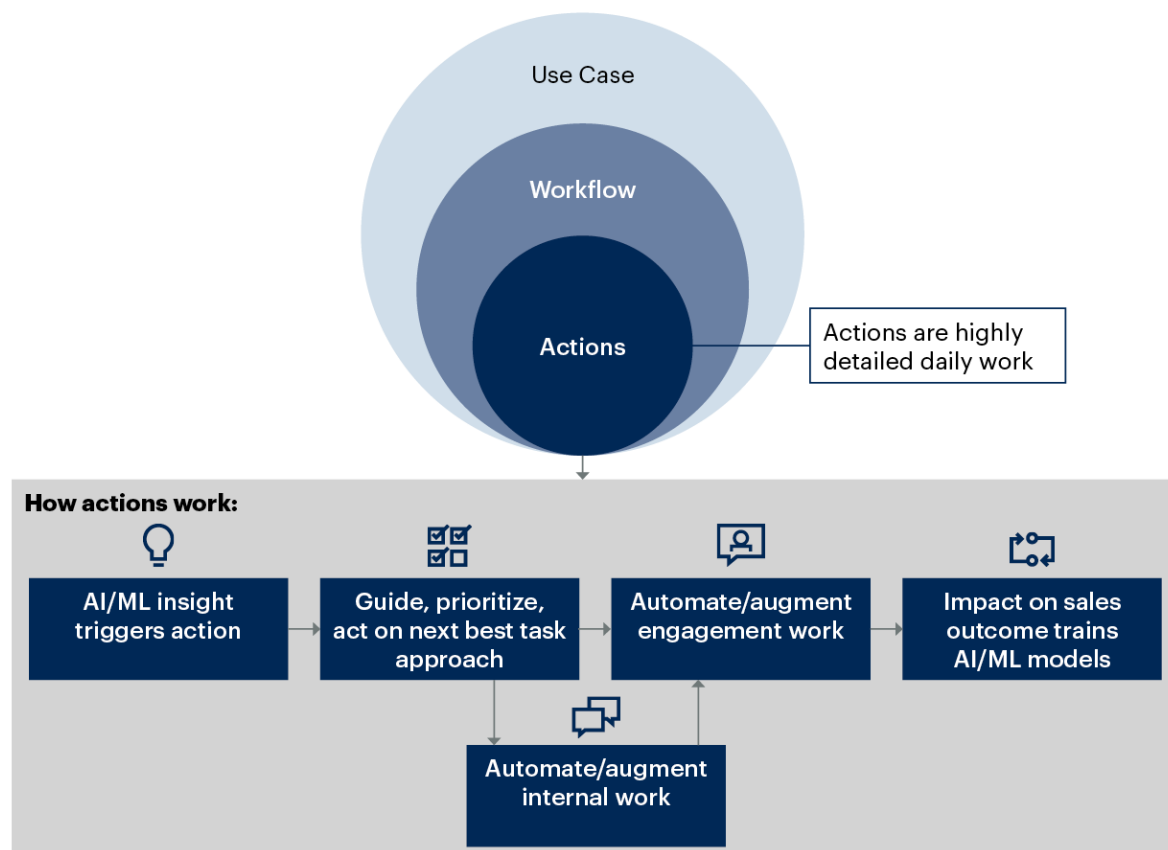
Organizations can integrate AI into actions to (see Figure 2):

- Create insights by linking underlying data signals to sales behaviors that drive positive outcomes
- Recommend internal or customer-facing actions, as well as the next best tasks associated with insights

- Facilitate team selling, collaboration or management tasks
- Execute customer-facing engagement tasks
- Capture the impact of actions on sales outcomes to improve AI/machine learning (ML) models

Figure 2: An Action Is a Unit of Work

An Action Is a Unit of Work



Source: Gartner
800202_C

Gartner.

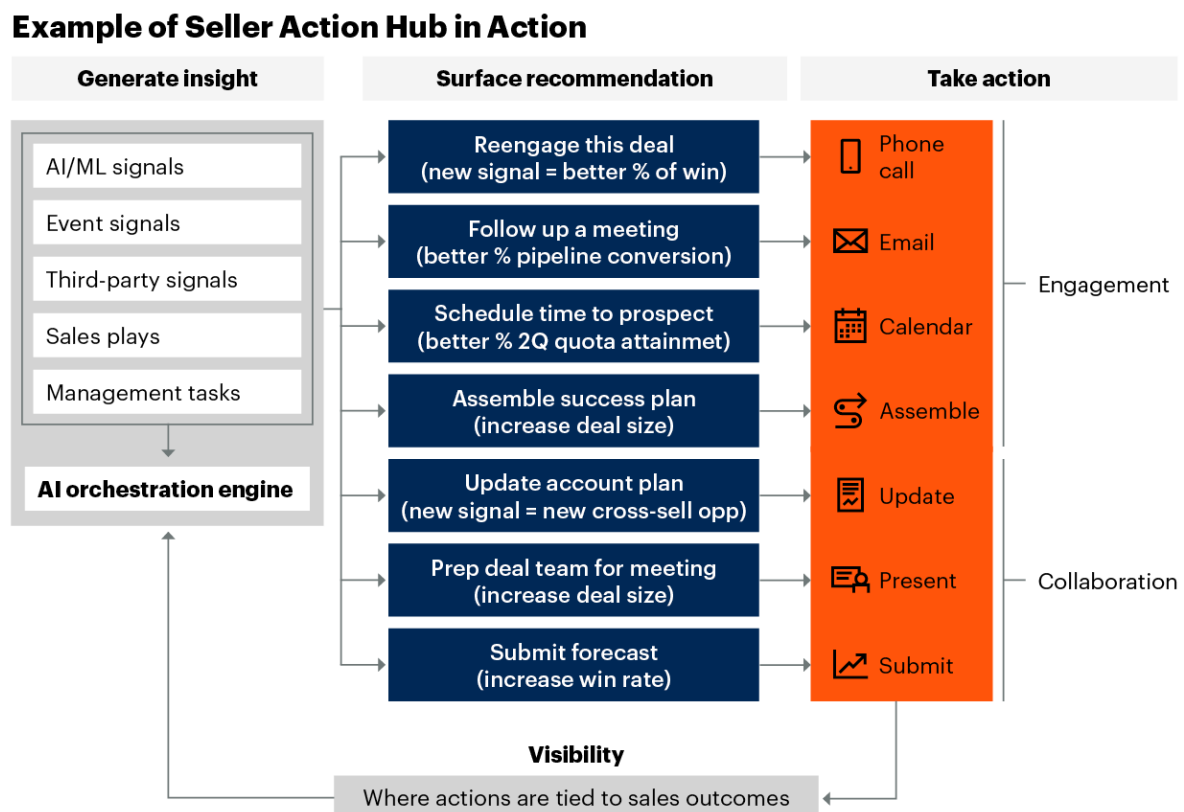
To determine the best use of AI for frontline sales teams, whether to augment certain actions or automate entire workflows, CSOs must first closely examine the unique workflows of each sales role in the organization.

Today, we expect AI to augment seller actions. In the next two to three years, sellers will decide whether to delegate actions entirely to AI agents. With this shift, AI/ML will:

- Give sellers the autonomy to initiate actions at will or accept/reject actions recommended
- Prescribe a list of actions based on prioritization models using AI-driven predictive insights
- Execute an action without having to leave their applications through interoperability with buyer engagement and internal applications

Figure 3 provides a more comprehensive illustration of what a Seller Action Hub might feel like from a rep's perspective.

Figure 3: Example of Seller Action Hub in Action

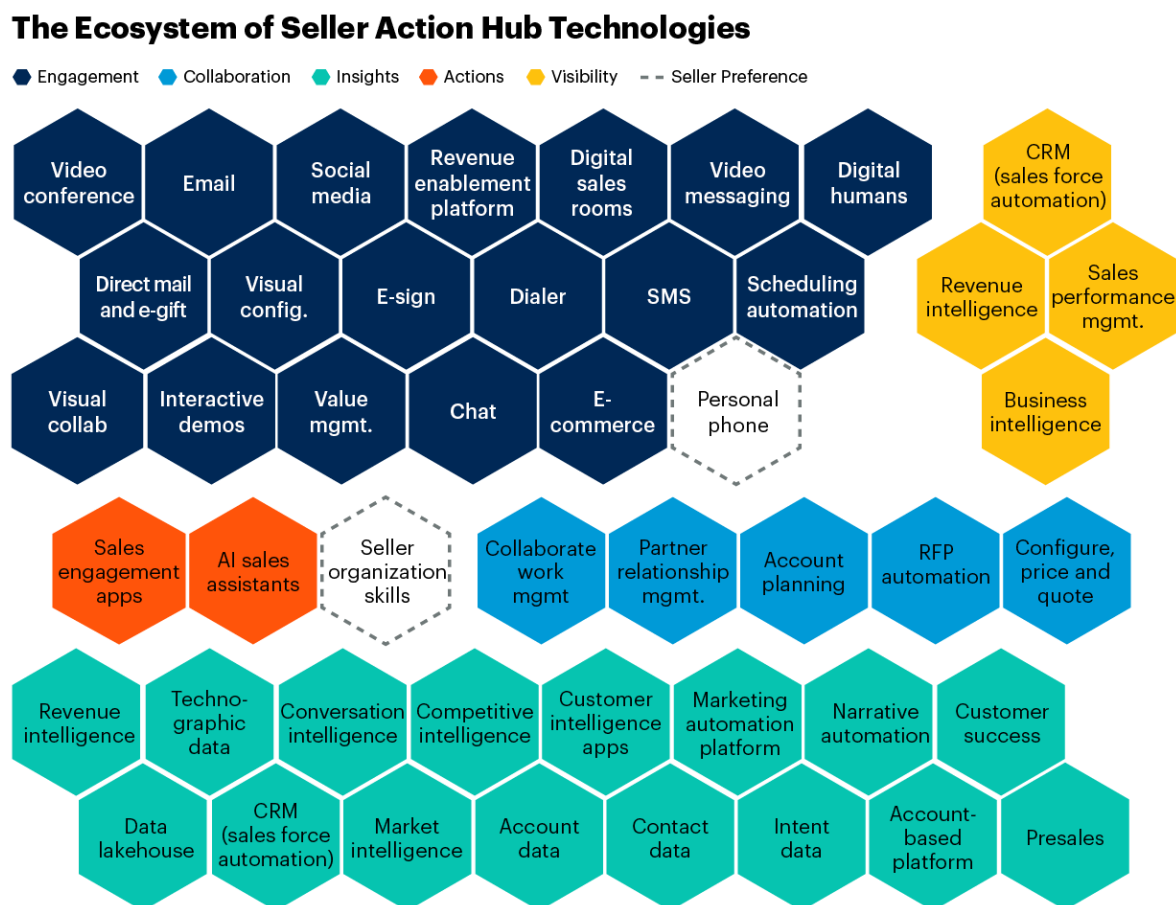


Source: Gartner
800202_C

Assess Your Tech Stack Across the Seller Action Hub's Five Layers

The Seller Action Hub's technology groupings reflect the perspective of a quota-carrying salesperson. CSOs should direct their tech teams to map existing technologies to the hub's five layers, fostering a shared language for evaluating their tech stack's support for sales actions. Figure 4 illustrates the ecosystem of Seller Action Hub technologies, while Table 1 provides a breakdown of their purpose and an analysis.

Figure 4: The Ecosystem of Seller Action Hub Technologies



Source: Gartner
800202 C

Table 1: Breakdown of Seller Action Hub Technologies

(Enlarged table in Appendix)

| Layer | Analysis |
|------------------------|---|
| Engagement | <ul style="list-style-type: none"> ■ Where sellers and buyers interact digitally. ■ Includes established technologies, like email and videoconferencing. ■ Emerging technologies include digital sales rooms and visual collaboration applications. ■ Sellers often rely on their personal mobile phones to do their job. |
| Action | <ul style="list-style-type: none"> ■ Where sellers initiate and receive actions through a streamlined user experience; paramount to the Seller Action Hub. ■ Includes established sales engagement applications and emerging sales AI assistant technologies (see Market Guide for Sales Engagement Applications). ■ The value of action technologies is derived from the combination of their preconfigured actions and their interoperability with technologies in the engagement, insight and internal collaboration layers to customize actions for different sales roles. ■ Without action technology, many organizations rely on seller organization skills to prioritize and execute actions. |
| Insight | <ul style="list-style-type: none"> ■ AI/ML provide insights that inform recommended actions. ■ Third-party insights come from solutions like go-to-market data applications (see Market Guide for Revenue Data Solutions). ■ First-party insights are based on data collected from the engagement and visibility layers, such as sales force automation and revenue intelligence platforms. ■ Includes custom AI/ML insights derived from internal data and analytics projects. ■ Ultimately, insights must be actioned by sellers, or technology, to provide value to the business. Therefore, an orchestration engine that's interoperable with the action layer is paramount to scale the impact of AI/ML insights via sales actions. |
| Internal Collaboration | <ul style="list-style-type: none"> ■ Improving internal team selling, collaboration and sales management tasks. ■ Includes established technologies that facilitate communication and collaboration among team members, such as team chat apps, as well as bid or proposal configuration apps. ■ Includes partner relationship management for working with indirect channel partners. ■ Collaboration tasks often integrate with the visibility layer to facilitate management tasks. |
| Visibility | <ul style="list-style-type: none"> ■ Where data is captured for analysis and management. ■ Includes technologies that collect and analyze data from the engagement and action layers, providing insights into how the sales process is performing and where teams can make improvements. ■ Sellers and managers will often discuss insights from this platform when conducting pipeline and forecast management routines. ■ Provides sellers with visibility into how performance affects compensation. |

Source: Gartner

Most organizations rely heavily on sellers' organizational skills to leverage the insights layer of the hub. By visualizing this dependence, organizations can see the urgency of incorporating action technologies into their planning process.

Commission a Discovery and Findings Analysis to Inform AI Roadmap Decisions

The CSO's goal is to guide their sales technology teams to understand seller workflow at the action level for optimal AI design choices. CSOs can use three tactics to instruct these teams to conduct a comprehensive discovery and analysis that should take six to eight weeks to complete:

1. Incorporate the request into strategic planning by having the sales technology team review its analysis in a workshop to further its understanding of the frontline sales team's actions.
2. Improve the adoption of recent tech investments by asking program management leaders to align the technology use with the reality of your sellers' actions in the context of their broader selling environment.
3. Use the Seller Action Hub as a framework for sales transformation in a new initiative, beginning with a workflow mapping exercise and a [Seller Time Spend Assessment](#) to improve AI investment decisions.

A concise guide to requesting a discovery and findings analysis is as follows.

Seller Action Hub Discovery:

- Map the current state of sales workflows, broken down into actions and organized by different sales roles.
- Prioritize five to 10 high-impact use cases that drive high conversion in your buyers' process or are frequently completed. Figure 5 provides recommended workflows to map based on insights from the Seller Time Spend Assessment.
- Capture nuanced differences in the seller's workflow based on factors like customer segment, typical workload, stage of buyer journey, experience level and collaboration partners. Don't overlook basic fundamental workflows, such as "buyer research" and "meeting prep." Mapping the basics is where the best opportunities reside.
- Use the terminology in the five layers of the Seller Action Hub to map the role of your current technologies in each sales action.

Seller Action Hub Analysis:

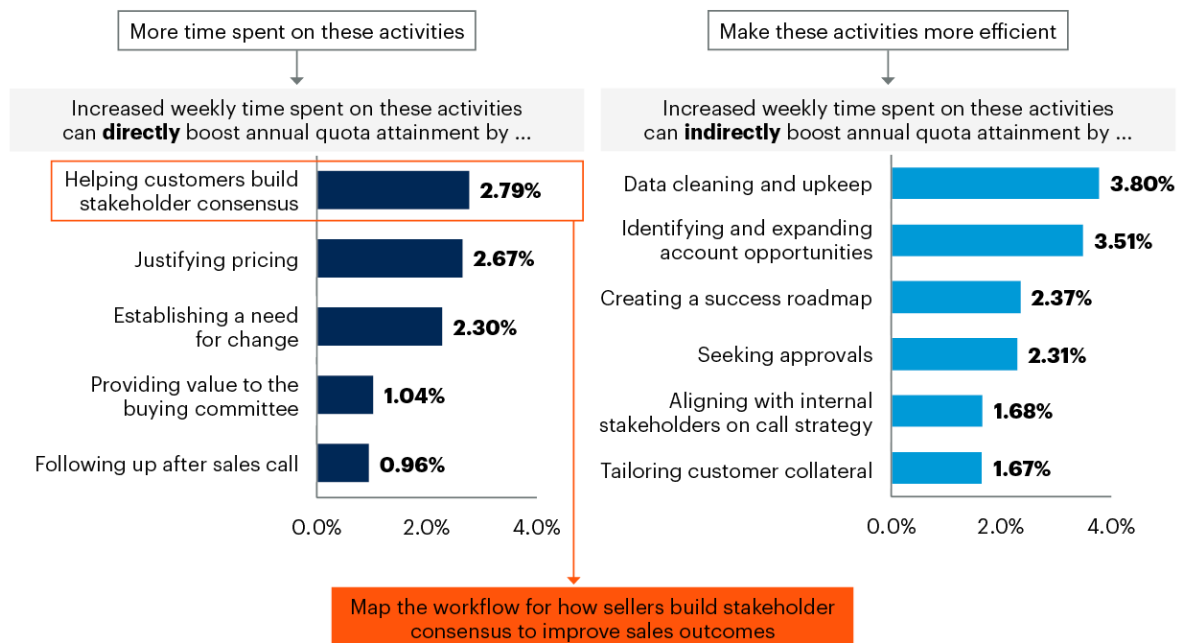
- Visualize friction in sellers' daily sales tasks to identify quick wins for AI to augment actions.
- Assess how many actions in the Seller Action Hub design map to technologies and how well.
- Visualize how many applications are required to identify opportunities for simplification.

- Assess how many actions do not have any technology supporting them and evaluate why.
- Assess where actions may be supported by duplicate technologies.
- Analyze which actions are too disparate, immature or complicated to receive support from technology.
- Hypothesize which actions sellers might wish for AI to augment or automate.

Figure 5: Map Workflows for Use Cases by Role

Map Workflows for Use Cases by Role

■ Client facing ■ Nonclient facing



Source: Gartner
800202_C

Evidence

¹ **Gartner Generative AI 2024 Planning Survey.** This survey was conducted to examine generative AI's use case implementation and impact by business function. The survey was conducted from September through November 2023. In total, 822 business executives who lead corporate functions outside IT and who indicated will begin or continue to implement generative AI across the next 12 months qualified and participated. The research was collected via online surveys in English. The sample was equally split across the following eight corporate functions: finance; HR; marketing; sales; customer service; supply chain; procurement; and legal, risk and compliance. The sample mix by location was North America (n = 536), Europe (n = 176) and Asia/Pacific (n = 110). The sample mix by size was \$50 million to less than \$500 million (n = 119), \$500 million to less than \$1 billion (n = 129), \$1 billion to less than \$10 billion (n = 374) and \$10 billion or more (n = 200). Disclaimer: The results of this survey do not represent global findings or the market as a whole, but reflect the sentiments of the respondents and companies surveyed.

Document Revision History

[Introduction to the Virtual Selling Tech Stack - 23 March 2022](#)

Recommended by the Authors

Some documents may not be available as part of your current Gartner subscription.

[Prioritize Seller UX in Generative AI Strategy](#)

[Benchmarking Generative AI Adoption in Sales](#)

[Innovation Guide for Generative AI in Sales](#)

[Cool Vendors in Generative AI for B2B Sales](#)

[Quick Answer: How Does Our Sales Technology Help Us Implement Generative AI?](#)

© 2025 Gartner, Inc. and/or its affiliates. All rights reserved. Gartner is a registered trademark of Gartner, Inc. and its affiliates. This publication may not be reproduced or distributed in any form without Gartner's prior written permission. It consists of the opinions of Gartner's research organization, which should not be construed as statements of fact. While the information contained in this publication has been obtained from sources believed to be reliable, Gartner disclaims all warranties as to the accuracy, completeness or adequacy of such information. Although Gartner research may address legal and financial issues, Gartner does not provide legal or investment advice and its research should not be construed or used as such. Your access and use of this publication are governed by [Gartner's Usage Policy](#). Gartner prides itself on its reputation for independence and objectivity. Its research is produced independently by its research organization without input or influence from any third party. For further information, see "[Guiding Principles on Independence and Objectivity](#)." Gartner research may not be used as input into or for the training or development of generative artificial intelligence, machine learning, algorithms, software, or related technologies.

Table 1: Breakdown of Seller Action Hub Technologies

| Layer | Analysis |
|------------|--|
| Engagement | <ul style="list-style-type: none"> ■ Where sellers and buyers interact digitally. ■ Includes established technologies, like email and videoconferencing. ■ Emerging technologies include digital sales rooms and visual collaboration applications. ■ Sellers often rely on their personal mobile phones to do their job. |
| Action | <ul style="list-style-type: none"> ■ Where sellers initiate and receive actions through a streamlined user experience; paramount to the Seller Action Hub. ■ Includes established sales engagement applications and emerging sales AI assistant technologies (see Market Guide for Sales Engagement Applications). ■ The value of action technologies is derived from the combination of their preconfigured actions and their interoperability with technologies in the engagement, insight and internal collaboration layers to customize actions for different sales roles. ■ Without action technology, many organizations rely on seller organization skills to prioritize and execute actions. |
| Insight | AI/ML provide insights that inform recommended actions. |

- Third-party insights come from solutions like go-to-market data applications (see [Market Guide for Revenue Data Solutions](#)).
- First-party insights are based on data collected from the engagement and visibility layers, such as sales force automation and revenue intelligence platforms.
- Includes custom AI/ML insights derived from internal data and analytics projects.
- Ultimately, insights must be actioned by sellers, or technology, to provide value to the business. Therefore, an orchestration engine that's interoperable with the action layer is paramount to scale the impact of AI/ML insights via sales actions.

Internal Collaboration

- Improving internal team selling, collaboration and sales management tasks.
- Includes established technologies that facilitate communication and collaboration among team members, such as team chat apps, as well as bid or proposal configuration apps.
- Includes partner relationship management for working with indirect channel partners.
- Collaboration tasks often integrate with the visibility layer to facilitate management tasks.

Visibility

- Where data is captured for analysis and management.

- Includes technologies that collect and analyze data from the engagement and action layers, providing insights into how the sales process is performing and where teams can make improvements.
- Sellers and managers will often discuss insights from this platform when conducting pipeline and forecast management routines.
- Provides sellers with visibility into how performance affects compensation.

Source: Gartner