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How Declining Commercial Efficiency is Holding Back Profitable Growth

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Summary

1. **Profitable growth has become elusive.** Higher costs and slower demand shrank the portion of companies growing profitably in 2023 by 19% year-over-year. Some companies pursued "growth at all costs," while others shed commercial expenses. Neither strategy achieved profitable growth.

2. **Commercial efficiency is eroding.** Spurred by inflation and higher wages, sales and marketing costs increased 68% from 2021 to 2023, while the median revenue growth rate fell by more than 50%. Go-to-market operations today are more expensive than ever while commercial teams are far less productive than they were in 2021.

3. **More commercial spending often triggers growth, but EBITDA compression leaves little to invest.** Revenue and commercial spending have been tightly aligned in recent years. More investment could generate growth, but most firms are near the point of EBITDA erosion.

4. **Differences in execution, not investment, separated market leaders from the rest.** The few companies (19%) that eclipsed median rates for both EBITDA margin and revenue growth raised commercial spending faster than the market but did not invest differently for growth. They were more efficient, achieving twice the growth yield on their sales and marketing spend through strong go-to-market performance.

5. **We recommend these four actions to improve commercial efficiency:**

   - Reduce time spent chasing poor business by identifying the strongest fit and highest propensity-to-buy accounts and narrowing territory sizes to better target them.

   - Redirect GTM investments into existing customer channels based on a data-driven analysis of expansion opportunities.

   - Establish distinct roles, responsibilities, and accountability for retention efforts.

   - Rationalize investments in revenue technology to refine commercial datasets and establish a coherent fact base for GTM decisions.

Facing headwinds from inflation, rising wages, and decades-high interest rates, most companies are struggling to realize their growth ambitions. With sluggish demand leading to slower pipeline generation, CEOs and CFOs have attempted to keep commercial costs in line with limited success. They continue to be challenged with balancing the need to be prudent with resources while investing where necessary to generate revenue.

Despite these recent struggles, our first half of 2024 surveys suggest company leaders are looking at 2024 and beyond as a time when value creation will come from accelerating growth rates. And nearly half expect to do so while maintaining or reducing their rate of investment in the business. The question is how to properly invest resources to fuel growth initiatives and capture demand as it returns across sectors.

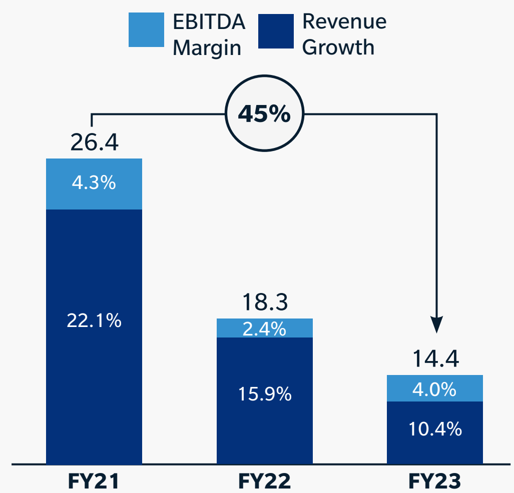
To answer that question, we used "Rule of" metrics (i.e., the combination of revenue growth rate and EBITDA margin) to evaluate revenue performance and operating profitability at 237 SaaS, information technology, and commercial services companies from 2021 to 2023. Our goal was to identify differences in how leading firms navigate changing market dynamics to maintain commercial momentum.

Profitable growth has become elusive.

By now it is well-known that most sectors have seen a significant pull-back in demand (particularly in SaaS). In our analysis, we found that slower demand has led "Rule of" performance across sectors to decline by 45% from 2021 levels, with median companies achieving a mediocre "Rule of 14" in 2023. This is a far cry from the common target of "Rule of 40" and is driven primarily by a steep drop in annual revenue growth rate. While CFOs strained operating budgets to keep EBITDA relatively flat, the median revenue growth rate plummeted by more than 50% from the peaks of 2021.

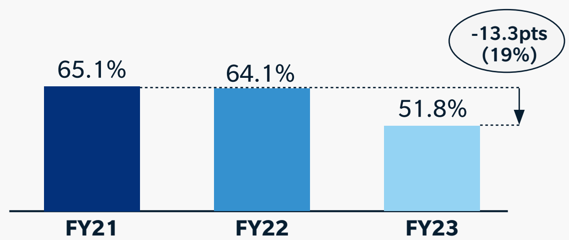
Rising costs from inflation and waning demand have led to a dwindling portion of companies maintaining both healthy growth and sustainable earnings. Indeed, the share of companies that achieved any increase in revenue while also maintaining positive EBITDA margins shrank to 52% in 2023, a 19% decrease year-over-year. Roughly half of commercial teams failed to outpace 2022 revenue or maintain operations within budget. For some, the pursuit of "growth at all costs" even in a demand-constrained environment led to heavy spending on sales and marketing, while others shed commercial expenses and sacrificed growth for profitability. In both cases, almost half of companies failed to achieve the desired outcome of profitable growth.

Median "Rule of" Performance, FY21-FY23
Revenue growth + EBITDA margin



N=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Share of Companies Growing Profitably, FY21-FY23
Companies with both positive revenue growth and positive EBITDA



N=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

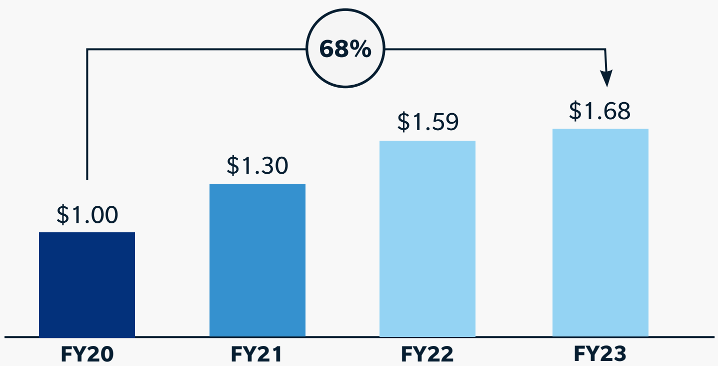
CEOs and CFOs recognize that this downward trend cannot continue. But this is not just a matter of rising out of a challenging demand environment. Many of the trends underlying that environment – higher interest rates, low unemployment, and more expensive talent – are likely to persist even as demand returns. To realize profitable growth, company leaders must right-size their investments to market conditions and execute effectively to see a positive return.

Commercial efficiency is eroding.

While most companies have seen slower growth in recent years, commercial costs have sky-rocketed. Spurred by inflation and the lingering effects of the Great Resignation, higher wages have dramatically increased the cost of commercial talent. Because compensation cost of sales is typically the lion's share of sales and marketing budgets and wages are unlikely to decline, a higher premium for commercial productivity is the new normal.

Taking a closer look at operating expenses, we found that sales and marketing costs increased by 68% from 2020 levels, ballooning today's operating budgets and straining margins. For every dollar companies spent on sales and marketing in 2020, they spent $1.68 in 2023.

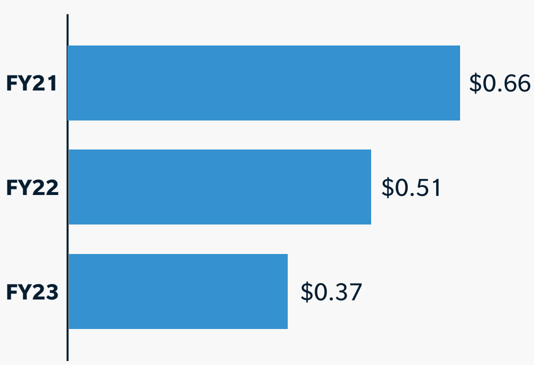
Growth of Sales and Marketing Expenses, Indexed to 2020
Change in median value of annual sales and marketing expense per dollar



N=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in US and Canada

For every dollar companies spent on sales and marketing in 2020, they spent $1.68 in 2023.

Median Growth Yield on Sales and Marketing Expense, FY21-FY23
Year-over-year growth $ / sales and marketing spend $



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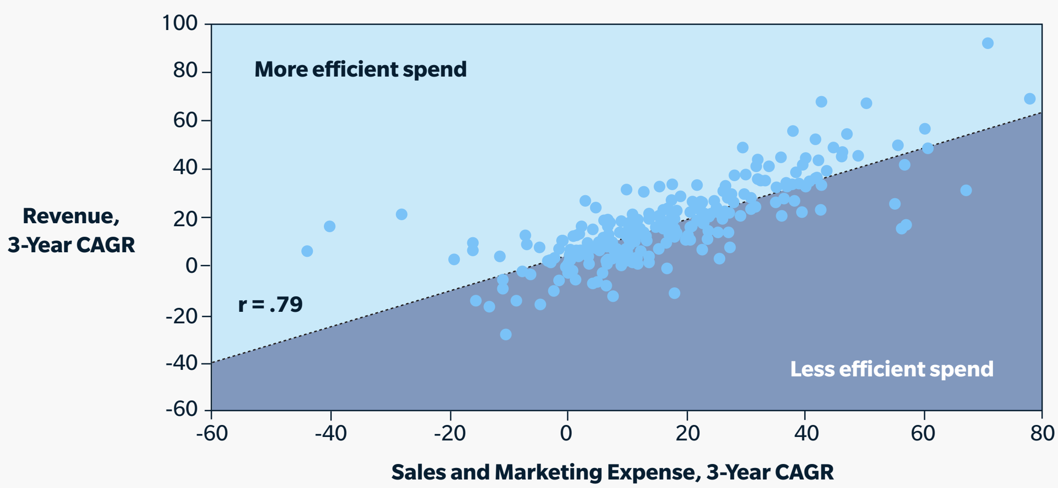
Despite spending considerably more to drive commercial activity, as mentioned above the amount of revenue growth companies are seeing from that spending has shrunk substantially. Commercial teams are operating far less efficiently. Comparing annual sales and marketing expenses to year-over-year changes in topline revenue – what we call the growth yield on sales and marketing spend – we found that in 2021 commercial teams grew revenue $0.66 for every dollar spent on sales and marketing but a mere $0.37 in 2023.

Most commercial teams were met with more risk-averse buying groups when the post-covid "boom" of 2021 turned into an economic slowdown. This delayed, shrunk, and often killed deals. Coupling this with the increased spending on sales and marketing described above, in hindsight it's not surprising that the return on that spending declined so significantly.

More commercial spending could increase growth, but most companies have little left to invest.

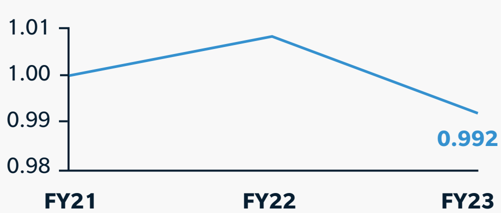
When comparing operating expenses to company performance, we found that revenue growth and commercial spend have been tightly aligned in recent years. Companies that increased investment in commercial teams to keep pace with rising costs generally saw stronger growth, while companies that failed to invest typically grew less or not at all.

Revenue Growth and Sales and Marketing Expenses, FY21-FY23
Revenue, 3-year CAGR vs. Sales and Marketing Expense, 3-year CAGR



N=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Median Operating Ratios, FY21-FY23
(Operating Expenses + COGS) / Total Revenue



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Anticipating this strong correlation with increased sales and marketing investment, CEOs and CFOs may be tempted to blindly spend their way to growth without examining the efficiency of commercial processes. But not all growth is profitable growth. And most companies have little additional operating budget left to invest. Median operating ratios (operating expenses plus COGS, divided by total revenue) for the market have remained at or near 1 since 2021, meaning most companies have been spending about what they earn in revenue on operating expenses and cost of goods. For these companies, increasing sales and marketing budgets while maintaining positive EBITDA is no longer an option.

While inflation appears to be slowing in the first half of 2024, costs are unlikely to decrease but instead remain flat or grow at a slower rate. Given already tight operating budgets, companies will need to improve commercial performance at existing investment levels. While it's true that increased spending alone can often spur growth, profitable growth can only come from increasing the productivity of sales and marketing teams. CEOs and CFOs must find ways to increase the efficiency of their core commercial processes.

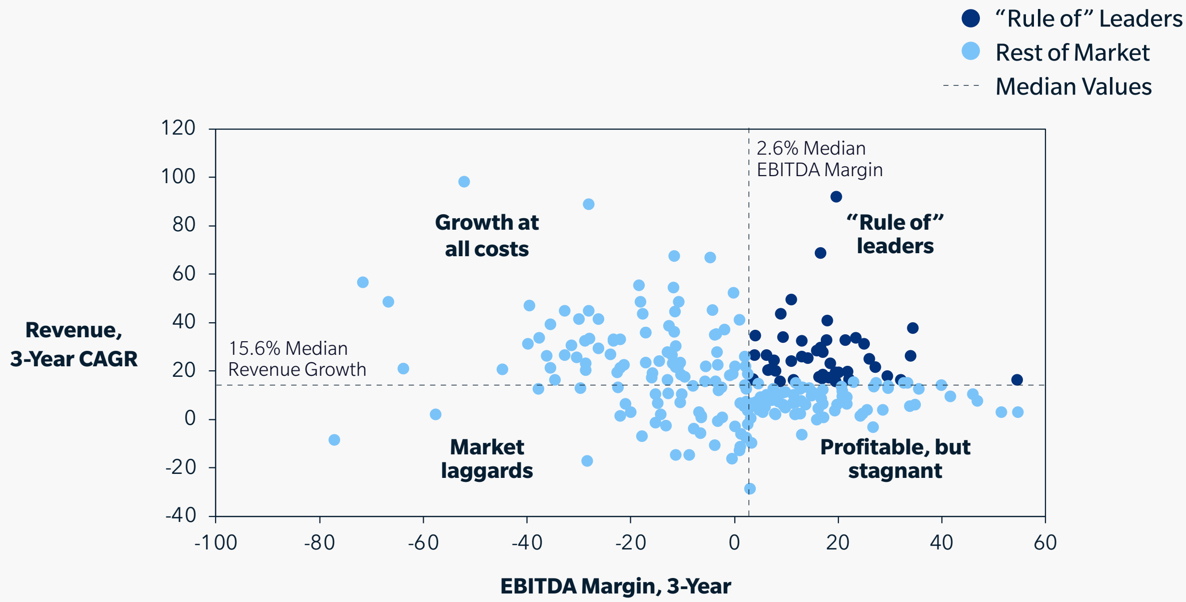
Differences in execution, not investment, separated market leaders from the rest.

While weaker demand has impacted most firms, our analysis uncovered that declines in productivity were not necessarily universal. Profitable growth has been elusive, but some companies have maintained stronger productivity than their peers without the "growth at all costs" mentality.

We found that 19% of companies (44 of 237) outperformed the median for both EBITDA margin and revenue growth from 2021 to 2023. These commercial teams – we call them "Rule of" leaders - managed to steadily outpace the market in commercial efficiency, growing more than most of their peers and doing so with greater profitability.

Revenue Growth and Sales and Marketing Expenses, FY21-FY23

Revenue, 3-year CAGR vs. Sales and Marketing Expense, 3-year

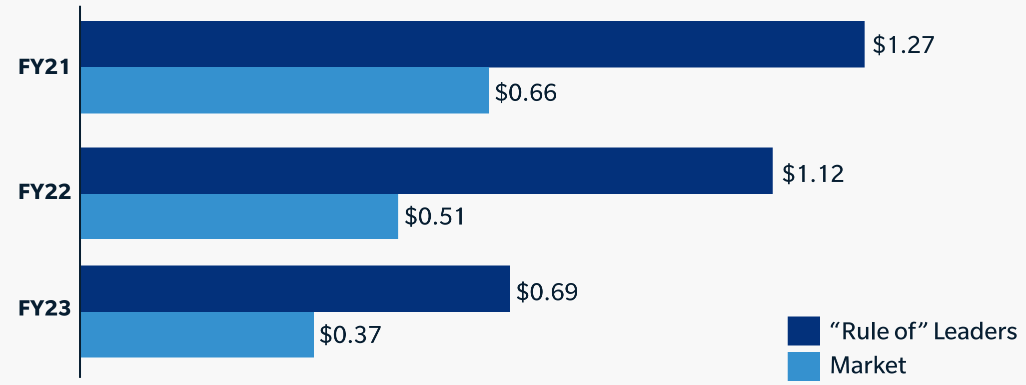


N=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada. Note: EBITDA margin, 3-year is the sum of annual EBITDA / the sum of total revenue from FY21-FY23

To identify companies with the strongest and most consistent "Rule of" performance, we looked at the compound annual growth rate (CAGR) of revenue over the last three fiscal years and the aggregate EBITDA margin in that period, i.e., the sum of all EBITDA as a percentage of total revenue from FY21-23. This allowed us to distinguish companies with sustained profitable growth from those with exceptional, but one-off results. Some "Rule of" leaders excelled more in growth than EBITDA and vice-versa, but all leaders beat the median for both revenue and margin.

As expected, “Rule of” leaders have seen much stonger returns on their commercial investments. From 2021 to 2023, for every dollar they spent, they realized roughly twice the growth compared to their peers.

Median Growth Yield on Sales and Marketing Expense, FY21-FY23
Year-over-year growth $ / sales and marketing spend $



“Rule of” leaders n=44, market n=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Because “Rule of” performance is indicative of profitable growth, we sought to understand how leaders achieved better than market returns by comparing how they allocated commercial resources with the investments of average market performers. When leaders budgeted for growth, did they spend more on sales and marketing teams? Invest more heavily in product development? Or did they simply perform better because they enjoy better margins?

To identify ways in which “Rule of” leaders invested differently, we evaluated the four most critical components of the operating budget:

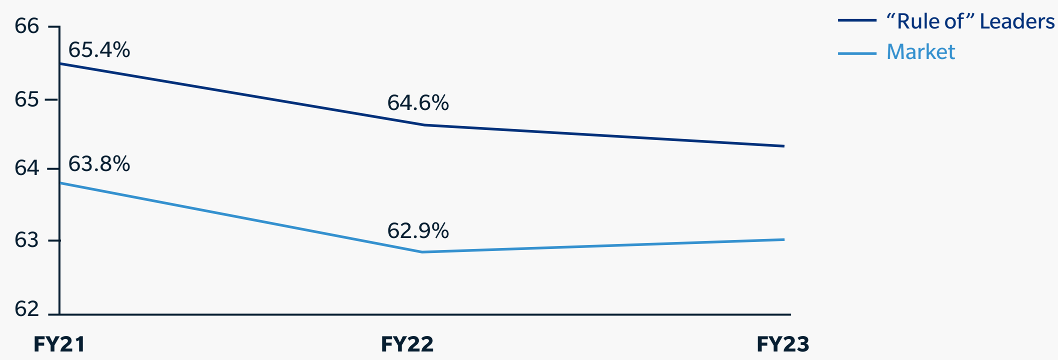
1. Gross margin (total revenue minus cost of goods sold)
2. Sales and marketing expenses
3. Research and development expenses
4. General and administrative expenses

Interestingly, we found more similarities than differences in the investment profiles of “Rule of” leaders and median performers.

Leaders planned similar operating budgets but realized vastly different results.

“Rule of” leaders saw similar gross profits to the rest of the market, meaning their average cost of goods sold was not significantly different than their peers. While leaders have realized one or two additional points in gross margin over the past few years, these gains are more easily explained by a slightly higher average selling price than by special access to less expensive materials or labor. “Rule of” leaders did not pay less for goods or collect substantially more per transaction; they simply transacted more business.

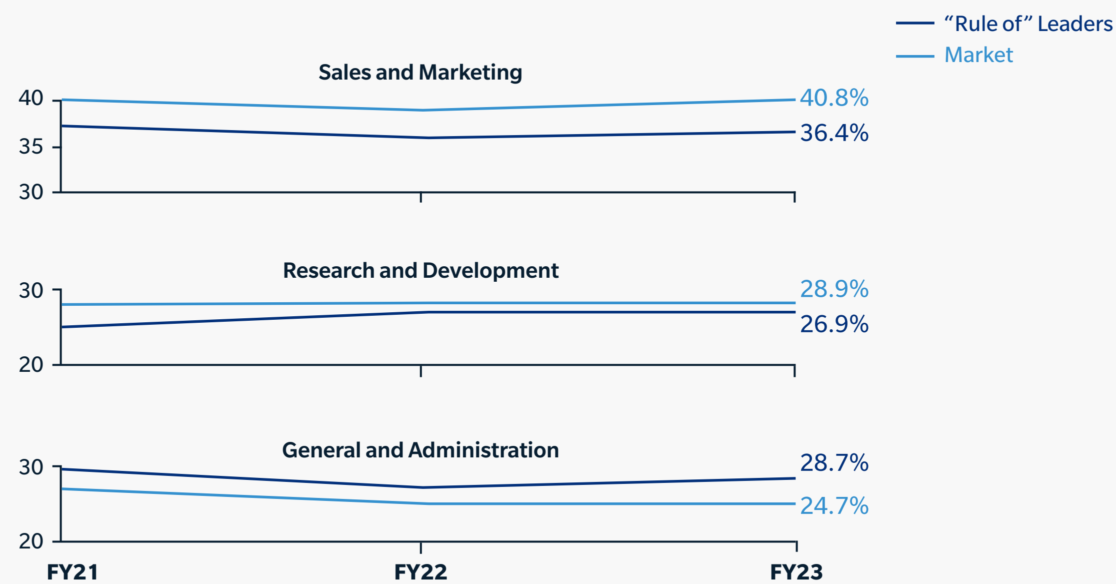
Median Gross Margin, FY21-FY23
Total revenue minus cost of goods sold / Total revenue



"Rule of" leaders n=44, market n=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Moreover, CFOs at "Rule of" leaders did not plan their operating budgets much differently than the rest of the market. When viewing line-item expenses as a percentage of total operating expenses over the last three years, leaders counterintuitively spent slightly less on sales and marketing and slightly more on general and administrative expenses. Still, taken together (as they often are on income statements), the ratio of sales, general and administrative expenses to overall expenses did not differ much for leaders. Spending on research and development was also similar for "Rule of" leaders and the rest of the market, meaning CFOs did not weight product development differently as a driver of growth.

Median Operating Expenses Percentage of Operating Budget, FY21-FY23
"Rule of" leaders vs. the market



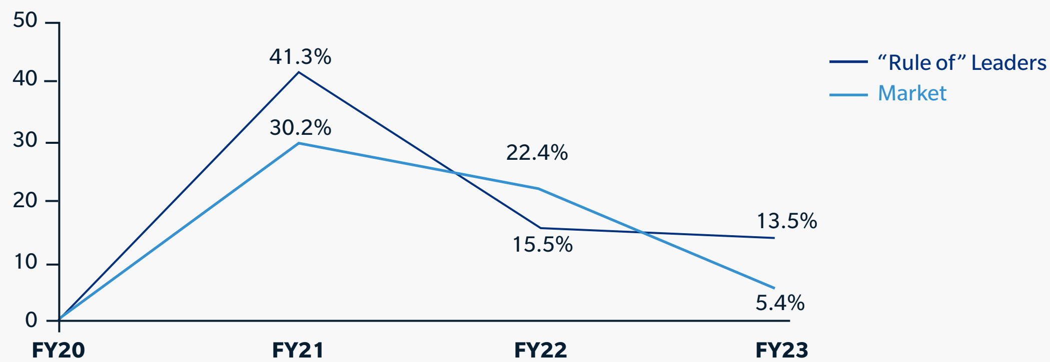
"Rule of" leaders n=44, market n=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Leaders were more responsive to market conditions.

One significant difference we uncovered between "Rule of" leaders and market peers was the rate at which they invested in their commercial teams. Leaders were much faster to increase sales and marketing budgets, spending 41.3% more in 2021 than 2020 versus a 30.2% increase for the market in the same period. These companies were more attuned to rising costs and were better able to adjust operating budgets to market conditions. And because they resourced their teams earlier than the market, they were ready to pounce as pent-up demand surged in 2021 and 2022. In contrast, average market performers were slower to invest and saw weaker revenue performance. As costs continued to rise and demand waned in 2023, they had little margin left to increase sales and marketing budgets.

Growth of Median Sales and Marketing Expenses, Indexed to 2020

Change in median value of annual sales and marketing expenses

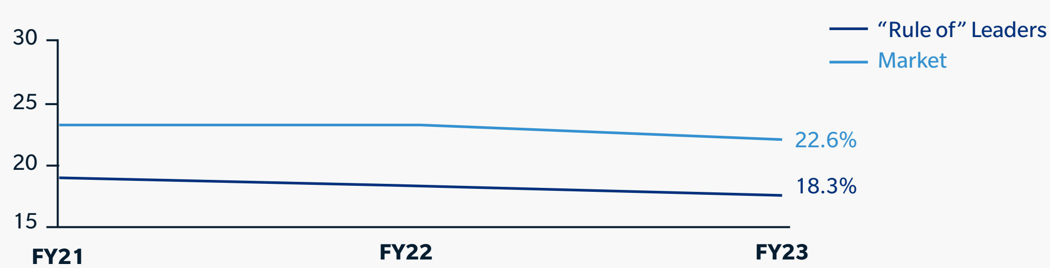


"Rule of" leaders n=44, market n=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in US and Canada

However, this does not mean "Rule of" leaders simply spent more and achieved profitable growth. Leaders have increased their budgets more aggressively but have done so while maintaining sales and marketing spend as a percentage of revenue between four and five points lower than the rest of the market. Of course because revenue performance is a lagging indicator, this is likely the natural result of stronger gains as opposed to necessarily being a conscious tactic. Ultimately, leaders did not seem to intentionally under- or over-allocate operating budget to sales and marketing. Rather, they were faster to right-size their commercial teams to efficiently capture market opportunity.

Sales and Marketing Expense Percentage of Revenue, FY21-FY23

"Rule of" leaders vs. the market



"Rule of" Leaders n=44, market n=237 public companies in SaaS, information technology, and commercial services with $100M - $5B in annual revenue and headquarters in the US and Canada

Take these four actions to improve your commercial efficiency.

Before allocating additional operating budget to sales and marketing, it's worth examining your commercial strategy to determine if your team is using existing resources effectively. Through experience in our most recent client engagements, SBI partners have noted commercial teams are losing efficiency with several common practices that were once considered prudent, but in the current operating environment are now sapping efficiency and holding back profitable growth.

To avoid productivity losses and gain momentum in present market conditions, we recommend CEOs and CFOs take these four actions now:

1. **Reduce time spent chasing poor business by identifying the strongest fit and highest propensity-to-buy accounts and narrowing territory sizes to better target them.**
2. **Redirect GTM investments into existing customer channels based on a data-driven analysis of expansion opportunities.**
3. **Establish distinct roles, responsibilities, and accountability for retention efforts.**
4. **Rationalize investments in revenue technology to refine commercial datasets and establish a coherent fact base for GTM decisions.**

In the following sections, we expand on these four recommendations to describe the common operating practices we see as problematic, where they go wrong, and the more effective strategies companies should use instead. Following each recommendation, we offer diagnostic questions for your leadership team to evaluate internal processes and spark discussion on opportunities to improve commercial effectiveness.

1. Reduce time spent chasing poor business

Common practice: Maximizing market coverage.

Commercial leaders tend to oversize territories, evenly allocating commercial capacity to all accounts and opportunities. This is thought to ensure no stone gets left unturned, especially helpful in a market with extended sales cycles and softer demand. Within those larger territories, leaders encourage sellers to prioritize opportunities using ”rule of thumb” firmographics that mimic previously closed-won opportunities.

Where it goes wrong: Companies too often plan territories based on low-fidelity firmographic data and frontline intuition, which are often disconnected from true economic potential. This results in precious commercial capacity ultimately being misallocated to lower fit, lower propensity-to-buy business. SBI routinely finds 20-30% of total commercial capacity mapped to poor fit accounts and opportunities.

Recommended best practice: Identify the strongest fit and highest propensity-to-buy accounts and opportunities; narrow territory sizes to reduce chasing poor business.

Enrich baseline firmographic data to identify and prioritize the highest potential accounts using SBI's ROAD model (see *Maximizing Commercial Efficiency with ROAD*). The model provides the basis for account coverage motions, helping leaders map the available whitespace in each account to the most efficient channels. For example, opportunistic accounts are mapped to lower touch, high velocity channels, and top-producing accounts are prioritized for development by seasoned strategic account executives.

With this more targeted coverage model, companies should also reduce territory sizes to a focused set of high-value accounts. Target a ratio of 15 - 20x account potential to quota for new business development roles, and 5 - 10x for account expansion teams.

Diagnostic questions for your team

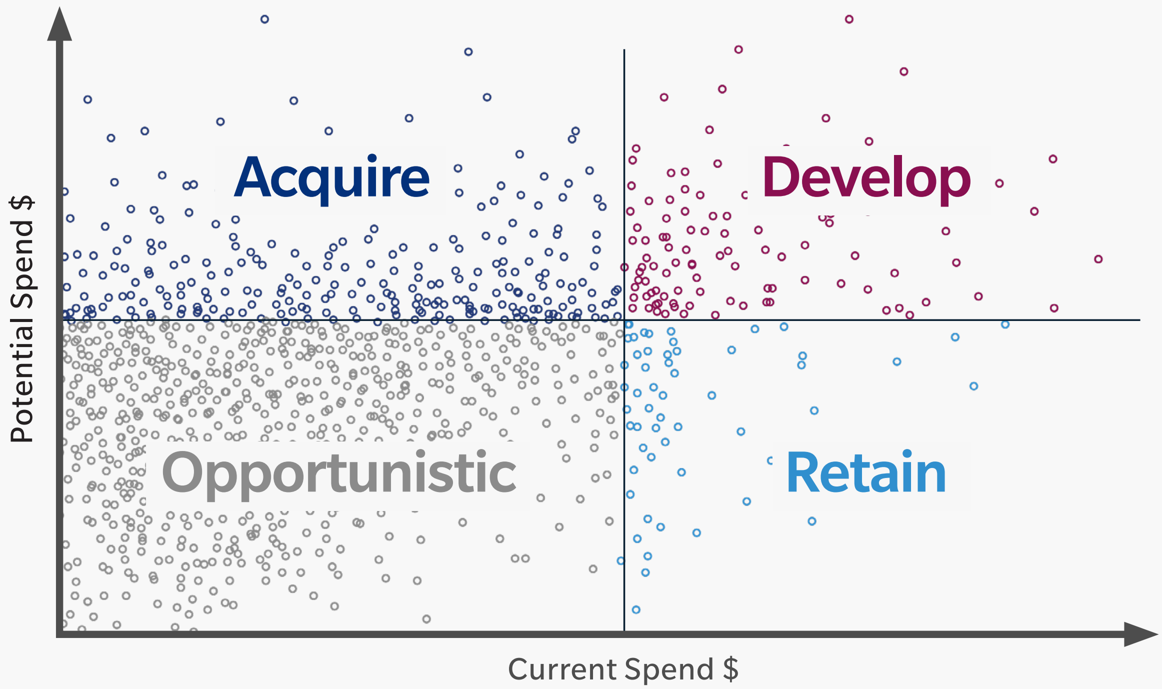
Are you targeting your best market opportunities?

1. How much of your team's selling time is deployed at your top potential accounts vs. lower potential accounts or reactive requests?
2. How do you balance sales territories with an equitable amount of account potential to maximize seller productivity? Do ramping sellers have the same amount of potential within their territories as tenured sellers?
3. Are your commercial leaders aligned on your ideal customer profile (ICP)? How do sales and marketing leaders allocate spending for demand generation and account expansion differently for accounts and prospects with a strong fit to the ICP?
4. What strategies does your marketing team use to direct spend to high-value segments? Or reduce wasted spend on low-value segments with little propensity to buy?
5. How are you evaluating the seller skillsets being allocated at your top accounts to ensure their capability matches potential?

Maximizing Commercial Efficiency with ROAD

The ROAD model is a standard framework for segmenting and prioritizing existing customers using whitespace (i.e., potential spend) and actual current spend for each account. The model divides the market into four groups, each with distinct sales motions and talent requirements to optimize market coverage. This allows company leaders to identify their best opportunities and align the right teams and processes to maximize commercial efficiency.

A sample ROAD model output aligning accounts to their optimal coverage strategy.



R

Retain

These are top-spending customers that require nurturing, but have little whitespace left to capture. Defend revenue in these accounts with your best customer success resources.

COVERAGE:
Account Manager or Customer Success

O

Opportunistic

These accounts have little current or potential spend. Cover via channel partners, digital marketing, or a "light touch" inside sales model.

COVERAGE:
Channel, Digital or Inside Sales

A

Acquire

These accounts have significant growth opportunity. Cover with top-performing "hunter" account executives, supported by sales development.

COVERAGE:
Account Executive, Sales Development

D

Develop

These are your largest, most strategic accounts. Cover with a well-orchestrated team of your most experienced sellers and customer success resources.

COVERAGE:
Account Manager or Customer Success

2. Redirect GTM expense to existing customers

Common practice: Prioritizing incremental additional commercial capacity to new logo acquisition.

Companies frequently respond to missed growth targets with a “fix what’s broken” strategy – incremental investment in net new revenue generation continues to favor new logo acquisition. Although they anticipate more than 60% of total revenue will come from existing customers, CEOs and CFOs assume that significant investment in “hunter” roles is necessary for growth should retention and expansion efforts fall short.

Where it goes wrong: Companies fail to properly identify and quantify attainable expansion sales within existing customer accounts, leading to poorly informed quota targets and compensation plans. As a result, frontline teams lack conviction in expansion goals, and impetus to achieve them is minimal. Disproportionate investment in new logo acquisition undermines retention and expansion, eroding current and future lower-cost growth opportunities. At the same time, resource allocation becomes increasingly incongruent with the bookings plan, over-indexing toward opportunities expected to contribute less than half of revenue.

Recommended best practice: Redirect GTM investments into existing customer channels based on a data-driven analysis of the best expansion opportunities.

Determine whitespace (account potential tempered with propensity-to-buy scores) using existing customer base to improve account targeting for expansion efforts. Reassess sales role designs to determine where expansion bookings are most effectively delivered, whether by CSMs, Account Managers, or pod-based go-to-market models, and revise quotas and compensation metrics for these roles. Assess marketing investments in demand generation versus customer marketing channels to balance investment in existing customer growth and optimize the revenue plan.

Diagnostic questions for your team

Are you fully capitalizing on growth potential in the base?

1. When creating the bookings plan, how do you determine how much revenue is going to come from gross revenue retention (GRR) improvement, i.e., retention, upsell/cross sell and ensure the appropriate headcount and roles are in place to achieve the plan?
2. How do you weigh investments in commercial resources against expected ROI for each customer segment?
3. How is your commercial team prioritizing the right accounts that have the most remaining whitespace?
4. Which commercial roles are best positioned to identify customer expansion opportunities? How do current incentives and metrics for these roles align with bookings targets for the base?
5. How does your marketing team balance investments in demand generation with campaigns focused on existing customer growth?

3. Establish clear accountability for retention

Common practice: Democratizing responsibility for retention.

Companies distribute responsibilities for retention and expansion efforts between customer-facing roles in account management and customer success, asking each team to "major" in one sales motion and "minor" in the other. They add layers of responsibility for the same sales motions across multiple direct teams with the intention of improving customer experience, believing that the collective effort will decrease churn and provide greater visibility into expansion opportunities.

Where it goes wrong: Unclear ownership leads to poor commercial accountability. Distributed responsibility for retention results in low intensity focus from multiple commercial roles. Because account teams are primarily incentivized on expansion, they devote attention to accounts with significant whitespace, leaving Customer Success (CS) to defend important, high-spending accounts that have less potential for growth. While account managers assume customer success managers (CSM) are commercially driving retention, CSMs actually spend more time on product education, activation, and other administrative tasks. And because CS can typically receive on-target earnings (or close to it) without achieving account expansion targets, they fail to identify expansion opportunities.

Recommended best practice: Establish distinct roles, responsibilities, and accountability for retention efforts.

Even in pod-based commercial structures (i.e., account manager, CSM, and account executive supporting a single account), drive absolute clarity in accountability for various bookings. For each selling role, establish clear responsibility for different types of bookings (e.g., renewals, cross-sell/upsell) and weight plan designs to reflect this emphasis.

Diagnostic questions for your team

Are you effectively executing on retention and expansion opportunities?

1. How does your commercial team allocate headcount to ensure profitable customer coverage for retention and expansion?
2. How does your commercial team segment accounts with the highest potential for cross-sell/upsell opportunities? How is that insight communicated to sales and marketing operators for execution?
3. How does your commercial team determine the right selling motions to drive incremental spend at pivotal points in the customer journey?
4. How do commercial teams create "plays" to drive new business within your customer base, such as gaining access to new buying centers or presenting new product use cases?
5. To what extent do commercial teams grasp the responsibilities of their role across the customer lifecycle? How well to they understand the commercial motions of other roles that support your customers?

4. Rationalize commercial datasets

Common practice: Relying on functional leaders to manage data sources.

Commercial teams often rely on multiple data sources and formats to support their analyses. Sales, marketing, and customer success leaders have authority to select revenue technology investments tailored to specific execution and analytical needs. This results in commercial teams using many different revenue technology tools and data services to track performance and gain market intelligence.

Where it goes wrong: Revenue operations teams attempt to reconcile contrasting data sources but are beholden to the decisions of functional leaders who lack the perspective or know-how to optimize go-to-market systems. Consequently, company leaders must make resource allocation decisions and determine account prioritization using highly imprecise information. Only 38% of CEOs report having the right data and insights to achieve their commercial goals. Disconnected tech, inconsistent reporting, and disparate information sources all lead to significant resource misallocation, resulting in poor coverage decisions and missed targets.

Recommended best practice: Rationalize investments in revenue technology to refine commercial datasets and establish a coherent fact base for go-to-market decisions.

Prioritize revenue technology investments to establish a clean and enriched commercial dataset. Empower revenue operations to serve as the authoritative source for all go-to-market data, optimizing the commercial fact base and ensuring consistent, accurate reporting for all functional leaders. Eliminate technical debt and unused "shelfware" that complicate data processes and don't add value, potentially reclaiming up to 20% of your rev tech budget. If internal capacity is limited, consider engaging a RevOps consultancy to establish and enhance your fact base prior to annual planning processes.

Diagnostic questions for your team

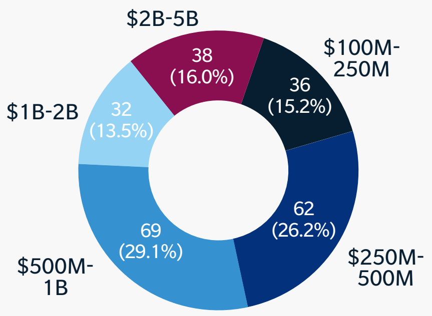
Are you using high-quality, complete data to make decisions that improve revenue outcomes?

1. How do your sales and marketing leaders readily and reliably monitor key measures of commercial performance to inform forecasting and annual resource planning?
2. How confident are you in the tools and processes revenue operations uses to collect and report sales and marketing performance to senior leaders?
3. How do senior leaders use data to make forward-looking decisions on commercial resource allocation?
4. What mechanisms, e.g., performance reviews, annual commercial planning activities, do you have in place to evaluate and course-correct ahead of potential internal or external challenges?
5. How do you ensure sales, marketing, customer success, and finance teams are using the same, accessible data to communicate and make resource allocation decisions together?

Methodology

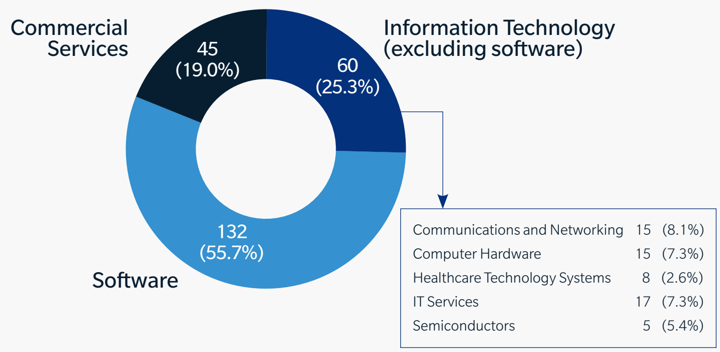
Our dataset includes 237 publicly traded companies with headquarters in the United States and Canada that primarily engage in business-to-business commerce in the Information Technology and Commercial Services sectors and maintained $100 million (USD) in annual revenue during fiscal years FY21, FY22, and FY23 -$5billion.

Companies by Revenue Band
Based on FY23 revenue performance



n=237

Companies by Primary Industry Group
Based on FY23 revenue performance



Why SBI?

Driven by insights and delivered from experience, SBI continues to help clients grow their revenue, margin, and enterprise value in ways never before possible.

Working with us, go-to-market leaders can expect confidence and trust with experienced partners every step of the way. We engage and support our clients as an extension of their team, both guiding and working side-by-side to deliver relatable, practical strategies that work for today and tomorrow.

Connect with SBI today and talk to us about how we can help you on your growth journey.

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