



FIELD NOTES / FIELD NOTE / SALES TECHNOLOGY

A Sales-Tool Rollout Is Not Proof of Adoption

Report what salespeople actually did with the tool, and keep the unobserved work marked unknown.

WHAT YOU WILL DO

Separate access provided from use observed. Describe the task, person and period your evidence covers before making a broader adoption claim.



SOURCE



INSIGHT



APPLICATION

ARTICLE / FILLABLE WORKSHEET / SOURCE NOTES



The software is available. What happened next?

GTMA proposal: when a sales-tool rollout reaches its review meeting, report three things separately: access provided, use observed, and use still unknown. An installed tool or an executive saying “the rollout is complete” answers a different question from whether a salesperson used it in selling. Give the status report the narrower label its evidence can support.

The research warns about who supplies the answer

In a 2024 cross-industry B2B paper, Friess and colleagues warn that sales executives can describe technology implementation but are less reliable respondents about salespeople’s use of it. This is the authors’ methodological caveat about their firm-level study, not a measured rate of managers overstating adoption.

The study does not establish how much a particular SaaS team uses its tools. GTMA’s check below is a proposed way to describe available evidence; it is not a study-validated adoption test or proof that tool use improves performance.

A fictional status report with an honest boundary

Fictional example: Maya has given her sales team access to a proposal assistant. Before writing “adopted” in the monthly report, she asks a salesperson to walk through a recent proposal. The assistant produced a draft, but the salesperson rebuilt it manually because the required pricing exception was missing. The tool was opened; its output was not used in the final proposal.

Maya records: access provided; draft generation observed on this proposal; manual workaround used; use on other proposals unknown. She assigns the pricing exception to the workflow owner and asks for another task walkthrough after it is addressed. She does not turn this example into a team-wide failure rate or declare the rollout adopted.

Ask for a task, then report only that scope

GTMA proposal: choose a relevant selling task and a period, then examine a completed instance with the person doing the work. Record what the tool produced, where that output entered the final work, and any workaround. Login counts can help locate activity; they do not establish that the intended task was completed with the tool.

If no relevant task arose during the period, record “no opportunity to observe” and revisit when one occurs. That is a useful alternative to prescribing training without a diagnosed problem. Even a successful walkthrough establishes only that instance of use. Repeated use across the team, better work and financial return each need separate evidence.



Worksheet: evidence of sales-tool use

A GTMA proposal for writing a bounded rollout status. One task does not establish team adoption or financial return.

Type into the fields, or print. Save a copy to retain your answers.

01 / Choose the role, task and period

Record which role, selling task and time window you are checking. Was there an eligible opportunity to use the tool? Keep a missing opportunity separate from non-use.

02 / Record what was provided

State the access, configuration or training supplied and how you know. This confirms provision only; it does not establish use in selling.

03 / Trace one completed task

With the person doing the work, record the tool output, where it entered the final work and any manual workaround or reason for non-use. Keep sensitive records in approved systems.

04 / Write the bounded status and next action

Separate provision confirmed, task use observed and still unknown. Name the scope, remaining question, action owner and revisit trigger. Do not infer team adoption, sustained use or return from one task.



Read further. Know the limits.

Source findings, GTMA proposals and fictional examples have different roles. Use the original research to examine its methods and context.

[1] The contingent effects of innovative digital sales technologies on B2B firms' financial performance

International Journal of Research in Marketing / Published: 2024

Attributed methodological caveat about sales-executive reports of salesperson technology use in a cross-industry B2B study. This is not a measured overstatement rate, SaaS adoption benchmark or causal result. The worksheet is a GTMA proposal and the example is fictional.

<https://epub.ub.uni-muenchen.de/118416/1/1-s2.0-S0167811624000429-main.pdf>

What the source supports

Friess and colleagues discuss sales executives as respondents on technology implementation and warn that they are less reliable respondents on salesperson use. The cited passage is in the study limitations on page 16.

The selected finding is an attributed methodological caveat. It does not quantify overstatement, measure your team's adoption or establish a causal effect.

Scope and unknowns

The paper concerns cross-industry B2B firms; SaaS-specific transfer is not established. The selected claim does not establish an observation period, adoption frequency, minimum acceptable usage or financial return. Publication year is not a measurement period.

GTMA proposal and fictional example

The status categories, task walkthrough and worksheet are GTMA proposals, not methods validated by this paper. Maya, the proposal assistant and its pricing exception are fictional.

One observed task supports a statement about that task and occasion. It does not by itself establish sustained use, whole-team adoption, better work or financial return.

The worksheet is a GTMA proposal, not a research-validated instrument. Fictional examples are illustrations, not evidence of results.