Charting a Path to Growth

SALES INSIGHTS FROM INC.'S ANNUAL CEO SURVEY

The leaders of America's fastest-growing private companies share how they are adapting to market shifts and solving sales challenges with technology and creative CRM processes.

The year 2025 has been a true test of will for even the most seasoned business leader.

Small and midsize businesses (SMBs) are grappling with more than just run-of-the-mill change. In addition to the many expected pressures that come with running a business, a recent report from McKinsey indicates that factors such as fast-changing trade policies, supply chain disruptions, and inflation pressures will continue to be major obstacles for business leaders in 2026 and perhaps beyond. These external forces are prompting dramatic transformations on all fronts, across business communications, team structure, sales and marketing strategy, and more. Every year, *Inc.* surveys CEOs of the Inc. 5000 list of the fastest-growing private companies in America to gain insight into the opportunities and headwinds they face. This year's Inc. 5000 CEO Survey—conducted in

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partnership with Salesforce—delivers deeper insight into how some of the most successful small-business operators in the country are tackling challenges to fuel growth in spite of the odds.

In the age of artificial intelligence (AI), it comes as no surprise that technology plays a key role in the standout strategies of the Inc. 5000.

In fact, 64 percent of Inc. 5000 CEOs said they plan to boost their sales tech budgets for the coming year. “There’s a really strong feeling that technology, specifically AI, is going to be super important for making sales teams more productive,” says Kris Billmaier, executive vice president and general manager, Sales Cloud and Growth, at Salesforce. “The increased availability of AI-powered sales tools is creating opportunities for limitless selling through technologies like Salesforce’s Agentforce, which can do things like automate lead engagement and provide coaching.” The survey findings also indicated that 88 percent of the surveyed CEOs are relying even more on technology solutions than they were a year ago.

In addition to Billmaier, we spoke with business leaders whose companies have ranked on the Inc. 5000 list multiple times to illustrate the survey findings in this report. With a mix of on-the-record interviews, valuable data insights, and anonymous founder testimonies, our research provides an inside view of how fast-growing companies are adapting their sales team structure, their various approaches to hiring and training, and how they plan to meet the projected challenges ahead.

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This is a strong group to follow, as roughly 83 percent* of those surveyed say they are on track to meet their 2025 sales goals, even amid ongoing market disruptions.

By bolstering or iterating their sales strategies with creative problem solving and adoption of new technologies, these companies are setting prime examples for how to grow sales faster.

**Percentages are rounded for easier viewing.*

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The People Powering Sales

No matter how much technology and AI stand to improve or hasten sales processes, the act of selling is ultimately a human experience. The quality of relationships between sales colleagues, managers, and their customers are make-or-break indicators of success in a company. That's why sales team structure is a major line of inquiry in the CEO survey.

CEO survey

This year, when asked how they prefer to organize their sales teams:

40.5%
Organize their sellers by account type

29%
By region

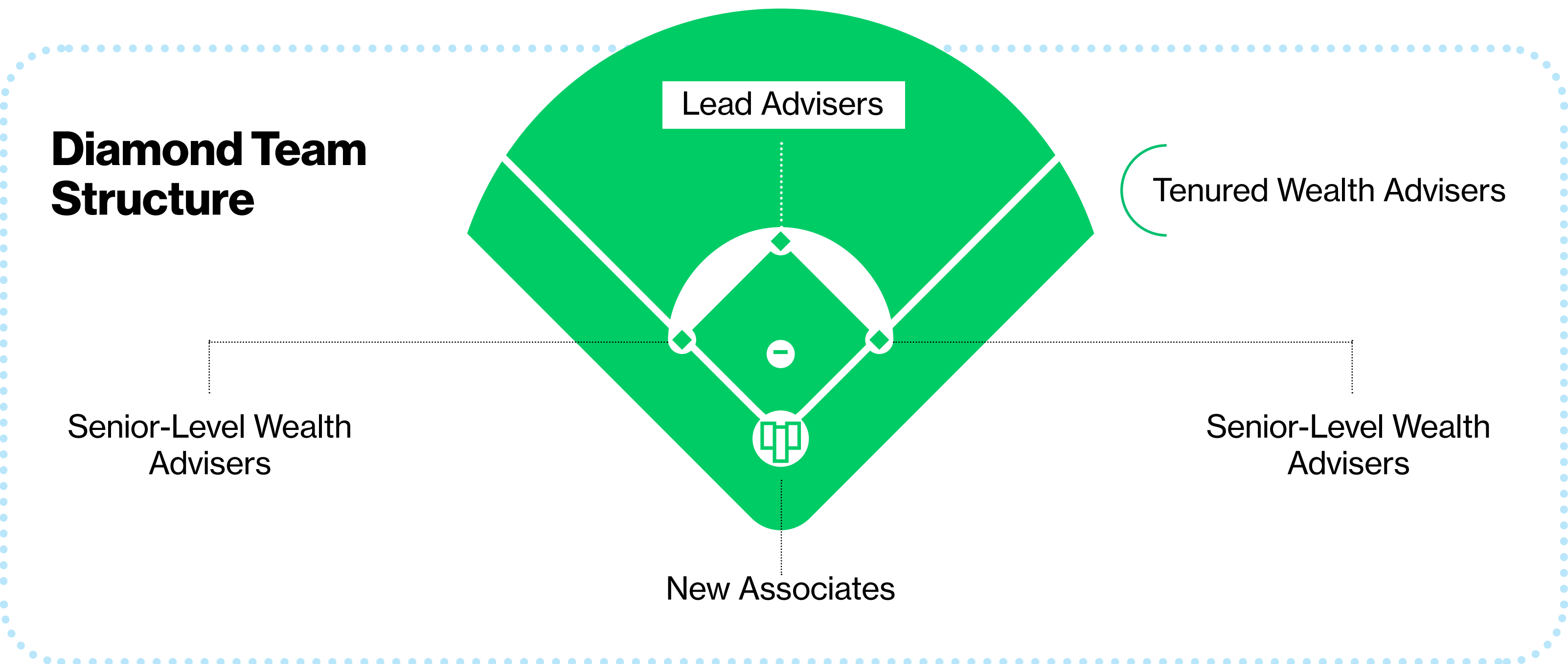
19%
By industry

23%
By other methods

Mission Wealth, a registered investment advisory (RIA) firm headquartered in Santa Barbara, California, falls into the "other" category with its creative approach to team structure. The company uses what Matthew Adams, Mission Wealth's CEO, calls a "diamond team structure," which positions advisers on a proverbial baseball field. Inspired by the work of organizational strategist Angie Herbers, this unique team structure was built specifically to help financial advisory firms balance growth with service. New associates start on "home base," learning the ropes by working and training with tenured wealth advisers who are positioned on the other corners of the diamond. "Second" base is occupied by lead advisers, who spend the majority of their time on business development functions like custodial referral programs. "First" and "third" base positions are led by senior-level wealth advisers who focus on client relationships and the firm's proactive service model.

> "That associate is learning from three far more experienced advisers. The associate supports all three advisers in either a sales or service support capacity, and they're learning it all from three great mentors."

—Matthew Adams, CEO, Mission Wealth



This unique approach helps wealth adviser associates have a clear path to career advancement with valuable mentorship opportunities and also maximizes visibility and accountability across the entire company. The diamond team approach encourages senior advisers and managers to have a shared sense of responsibility toward their associate so that they receive holistic training and gain valuable knowledge of all sides of the business. Clearly, it's working: Mission Wealth is a nine-time Inc. 5000 honoree with a reported 114 percent three-year growth rate.

Bridging the talent retention gap with intentional training

In today's hyper-competitive and fast-paced job market, business leaders are under even more pressure to deepen engagement with employees to find—and retain—top talent. This is an ongoing challenge for sales teams, with the average tenure of a salesperson in any industry clocking in at roughly 18 months.

A 2024 Bridge Group report shares that the median account executive turnover for business-to-business (B2B) software companies is 30 percent annually, with one-third of those salespeople leaving voluntarily. The sales teams of the Inc. 5000 seem to be bucking this trend, with roughly 59 percent of CEOs reporting they have less than a 5 percent turnover.

Thorough onboarding and employee training is a major contributing factor to the talent retention gap. The results of the CEO survey indicate that roughly half of all sales teams may be missing out on structured training, putting them at a disadvantage in a competitive market. Among teams that do offer training, there's a strong emphasis on both what to sell and how to sell, with a slightly less but still substantial focus on the tech tools that enable sales processes.

Do you have formal sales training for your salespeople?

Yes **50%** | No **50%**

Of the 50 percent who answered "yes," their training programs include:

General selling skills	Product specs and selling points	Platform-/customer relationship management (CRM)-specific training
83%	**85%**	**73%**

Mission Wealth is meeting this industrywide challenge head-on by using Salesforce in its new adviser training process. The company developed "take action" workflows in its multistage prospective client pipeline and sales process. For example, the "new business" workflow guides new advisers through six stages of client interaction, from introducing the client to Mission Wealth to onboarding them as a client. Similarly, there is a methodical breakdown of each stage of service, ensuring that staff members deliver the firm's comprehensive, proactive, and caring service model in an ongoing manner. Within these workflows, specific tasks for wealth adviser associates might include leveraging a template or automation in Salesforce or helping the adviser reach out to the client. The business intelligence and dynamic dashboards offered by Salesforce help Mission Wealth's managing directors identify a new adviser's strengths and follow-up opportunities. Mission Wealth invests heavily in its technology and Salesforce development team to ensure data hygiene throughout the organization and in all downstream departments to efficiently help clients.

Sales hiring forecast

While the majority of Inc. 5000 CEOs are still planning to hire in the near future, there's a modest shift toward more cautious sales team growth compared to last year. This slight dip may reflect tighter budgets, economic uncertainty, or a focus on maximizing productivity with current staff. The average of nearly seven new hires per team suggests optimism about sales opportunities in the coming year.

Do you anticipate expanding your sales team in the next 6–12 months?

	2024	2025
Yes	**82%**	**77%**
No	**18%**	**23%**
If so, by how much?		**7 people**

Leading by example pays off

In any team dynamic, the most successful leaders demonstrate an exceptional ability to inspire trust and respect from the group. In sales, this often means leveling with junior employees and showing a certain amount of humility and willingness to work alongside rather than commanding from above. CEOs of the Inc. 5000 are uniquely involved with their sales teams, with the survey showing they personally close about 35 percent of sales.

> "I really love the psychology of marketing and doing sales."
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> —Natasha Miller, founder and CEO, Entire Productions

"I really love the psychology of marketing and doing sales," says Natasha Miller, founder and CEO of the event planning and entertainment company Entire Productions. While she does take an active role in high-ticket, multimillion-dollar proposals for her 21-person company—which includes just three account executives and a sales director—Miller takes pride in the fact that many of their largest clients aren't aware they are negotiating directly with the CEO. Rather than highlighting her rank during client calls, she focuses on her company's services and translates her love of the events industry into passionate seller presentations.

The results speak for themselves:
Ranking number 2,007 on the Inc. 5000 list, Entire Productions has a 216 percent three-year growth rate.

Tech-Driven Sales Transformations

In keeping with the broader business community, Inc. 5000 CEOs are increasingly embracing AI and using the technology to streamline and accelerate sales processes. As sales-specific AI tools become more widely available and individuals gain more AI literacy with everyday use, CEOs are determining which AI use cases work best for their teams. An overwhelming majority (83 percent) of Inc. 5000 CEOs said they expect AI to help with sales tasks, and 94 percent reported that they are optimistic it will improve their overall businesses.

For Adams's team, AI is already helping with service tasks and more. Mission Wealth incorporated AI into its Salesforce CRM to help with meeting preparation, take notes, and pull data from client calls to highlight relevant action items. The AI tool creates follow-up cases in Salesforce through API integrations.

Last year, Mission Wealth measured a 50 percent productivity improvement for advisers using AI, compared to those who did not, through service decay dashboards in Salesforce.

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The advisers know annually which services each client will receive by year's end, based on the firm's proactive, segmented, and comprehensive service model. Those using AI completed the service set 50 percent faster.

"Client meeting follow-ups and client service items don't linger as long," Adams says, which is also a quality-of-life issue for the advisers, as those using AI do not feel behind in their work.

In addition to the process advantages of the platform, Adams notes that the advisers using AI feel they have more opportunity to make eye contact during meetings and develop closer connections across the company, ensuring that Mission Wealth's processes stay human-centered at heart. Clients now expect an AI notetaker to transcribe conversations. The tool can also immediately surface action items for advisers to complete or assign to others through Salesforce. “The advisers love it. Their heads are not buried in their notes,” Adams says.

AI Usage by Department for Inc. 5000 Companies
Second to marketing, sales seems to be the department most primed for AI adoption by Inc. 5000 companies.

73.5%	48%	40%	25%	13%	15%
Marketing	Sales	Services	Account Management	Billing	Other

**Respondents were able to choose multiple answers.*

“The data shows that AI is really making a difference in sales processes by helping teams save time and making sellers more productive,” says Billmaier. “It’s also what we are seeing at Salesforce, where customers are seeing the value of how humans and AI agents are driving customer success together with AI, data, and Customer 360 apps on one unified platform.”

At Entire Productions, Miller mandates that staff proactively learn how to incorporate AI into their roles by experimenting with generative AI. “We had them create an

“We had them create an AI prompt that says: This is my role. These are my top five things I need to do in my role. Here’s my job description. Give me three to five use cases for using AI for my job that will 10x my productivity. Include which AI tools would be best suited for each use case.”

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AI prompt that says: This is my role. These are my top five things I need to do in my role. Here's my job description. Give me three to five use cases for using AI for my job that will 10x my productivity. Include which AI tools would be best suited for each use case.” Her sales staff uses AI for prospecting, data scraping, and identifying companies in their target markets based on specific guidelines. To maintain transparency and safe AI usage, in each weekly staff meeting, employees share how they're using AI and their experience with the initiative.

As a paperless business, Entire Productions relies heavily on technology, with the Salesforce CRM playing a starring role. Since bringing Salesforce into her company in 2012, Miller leans on the tool in almost every area of her business. Each full-time role has a CRM touchpoint: event coordinators, administrative assistants, and production managers.

The company uses its CRM to track and communicate with clients and vendors, complete and store contracts, automate billing, and consistently deliver needed information to vendors. “If my entire team and I were in the Bermuda Triangle and lost at sea, the event would likely be executed to plan, because everything is captured and distributed to the right people at the right time, including the clients,” she says. The CRM also sends out SMS communication on the event day, reminding vendors of details and reassuring the clients that everything is set in motion.

Similar to Miller at Entire Productions, Adams finds the CRM vital to running Mission Wealth. "Salesforce is the gold standard as the only CRM that larger firms use because of the transparency, the customization around business processes, and the ease of the business intelligence," he notes. "I don't think we'd be able to communicate as efficiently with our 180 people, and I don't believe we would have been able to develop our mergers and integrations department had it not been for Salesforce."

Must-Have Features

in a CRM as reported by Inc. 5000 CEOs

- Adapts to the niche
- AI incorporation
- Analytics and insights
- API integrations
- Compliance
- Customer support
- Customizable
- Ease of use
- Flexibility
- Reliability
- Reporting
- Robust tools

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Turning Challenges Into Future Opportunities

Given the ongoing economic uncertainty throughout 2025, it's no surprise that Inc. 5000 CEOs shared numerous obstacles to growing their sales this year. "However, we're still seeing sales teams successfully tackle some big challenges, especially when it comes to finding new customers and building their pipeline," says Billmaier.

Challenges to sales processes:

33%	17%	14%	14%	12%	10%
Building pipeline	Time to close	Forecasting	Competition	Seller productivity	Other

Though "building pipeline" remained a top sales challenge this year (33 percent), it is a notable drop from 43.5 percent reported in 2024. This year, sales teams are struggling more with "time to close" and "competition," aspects that have gained more urgency in today's increasingly complex sales landscape.

Navigating sales growth roadblocks

Acquiring customers continues to be the biggest sales growth challenge for Inc. 5000 CEOs surveyed, with the data showing a slight improvement from last year (around 62 percent in 2025 versus 68 percent in 2024). Miller's struggle to ensure that more companies know about her firm's services reflects this trend. She relies on Salesforce's data-collection abilities to help cut through the noise so the events company can quickly show its value.

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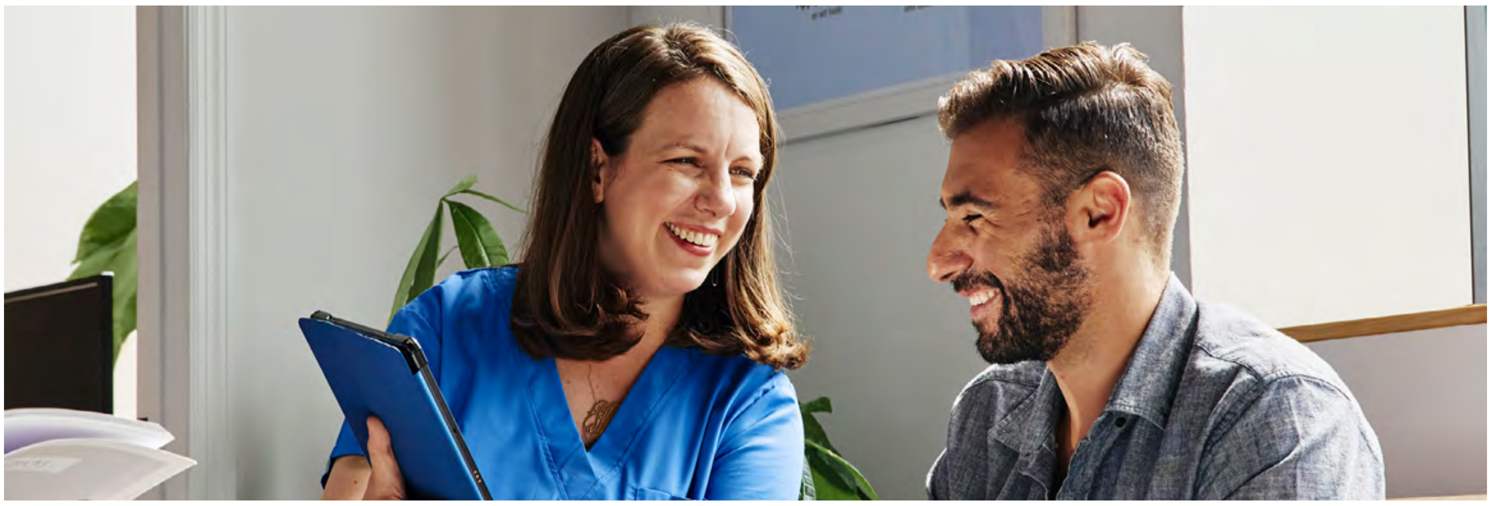
Survey respondents shared strategies they use to overcome sales obstacles:

From CRM workflows to AI-driven customer communication, we're reducing manual processes and improving efficiency, allowing our team to handle higher volumes without burnout.

We're reimagining how we acquire new customers through more automated, data-driven strategies. We're testing new marketing systems, improving our funnel, and working toward predictable, repeatable growth. Now the goal is to build a machine that works with or without me. That's where our next level begins.

We're hiring a coach, adding tools, process, automation, and more salespeople.

We are focusing on clear communication across teams, investing in training to ensure full adoption of tools, and continuously refining our processes based on feedback. Additionally, we prioritize technology that integrates smoothly with existing systems to reduce friction and improve efficiency.



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Game, Set...Sell

Inc. 5000 companies have set the pace for 2025, driving innovation and growth through creative problem solving, stronger employee engagement, and advanced sales strategies that put people first while harnessing technologies like AI. Spanning 34 diverse industries, these high-growth firms boast sales teams that differ in size, structure, and training methods, proving that top-tier performance comes in many forms. What unites them is an unwavering commitment to visionary leadership, continuous employee training, and pro-technology mindsets.

"AI and other tech are going to seriously shake up sales teams in the next five years. The biggest change is that sales reps won't be bogged down by all the manual administrative tasks anymore," says Billmaier. "Instead, they'll use AI tools as their personal assistants, so they have more time to focus on the really important work, like building relationships and solving strategic problems. AI isn't going to replace the human touch. Those soft skills and the ability to really understand what our customers need are still going to be key."

SMB leaders on the Inc. 5000 list are focused squarely on growth, even as they face familiar hurdles like customer acquisition and attracting top sales talent. Their solutions? Deep employee engagement, ongoing skill development, and transparent AI adoption strategies that are redefining talent retention and creating more agile, collaborative sales cultures. In this hyper-competitive business landscape, sales organizations are transforming fast: investing in process innovation, balancing tech upgrades with employee empowerment, and proving that industry leadership requires both ingenuity and transparency.

To learn more about Salesforce, the world's leading AI-powered CRM software, visit:
▸ www.salesforce.com/smb

To learn more about this year's class of Inc. 5000 honorees:
▸ www.inc.com/inc5000

To see more data from the Inc. 5000 CEO Survey:
▸ https://www.inc.com/inc-5000-ceo-survey