

Executive Summary: Roundtable Discussions – Management’s Role in Growing Existing Customers

Table 1 – Four Key Discussion Themes

1. Business Conversation Capability Requires Structural Support

Organizations shared the challenge of salespeople defaulting to product features rather than business impact. Success emerged where companies trained reps to understand customer workflows, and paired them with internal subject matter experts to co-sell. Sales teams that lacked confidence in delivering promised value struggled unless they were shown that delivery was feasible and credible.

2. Team Selling and Role Clarity Improve Performance

Rather than expecting one rep to manage the entire customer dialogue, organizations are evolving toward team-based selling. This includes enabling technical specialists and consultants to handle deeper discussions, while account managers focus on orchestrating value conversations.

3. CRM as an Enabler – Only if Simplified and Integrated

Adoption remains low when CRMs are overly complex. Best practices include using structured, minimal-input forms (like dropdown-based visit reports), and ensuring CRM data is actually used by management. Showing “what’s in it for them” significantly boosts usage.

4. Confidence and Credibility in Business Conversations

Salespeople are more effective when they understand their customer’s industry metrics and can connect offerings to KPIs. Real-world examples included reps using financial reports or public data to tailor their messaging. AI tools and conversational recording were highlighted as emerging enablers—if implemented with trust and clarity.

Table 2 – Four Key Discussion Themes

1. Avoiding ‘No Decision’ Through Qualification and Early Insights

Participants reported high rates of deals ending in no decision. Management must shift focus from chasing every lead to understanding early whether a problem is seen as high-priority by the customer. Qualification should be continuous, not a one-time step.

2. Outcome-Based Messaging and Role-Specific Language

Many salespeople struggle to articulate outcomes that matter to diverse stakeholders. Training sales reps on how their offer influences each stakeholder’s KPIs (category managers, engineers, procurement) was seen as a breakthrough tactic. Moving from product training to KPI-based coaching was heavily supported.

3. Management Behavior as a Change Driver

The biggest transformation enabler is not more tools—it’s consistent manager behavior. When frontline managers use CRM data themselves, define leading KPIs (vs. lagging revenue), and simplify processes, teams perform better. This cultural

alignment around shared dashboards and expectations proved to be a game-changer.

4. Simplification and Elimination of Non-Essential Processes

Organizations that eliminated internal complexity—such as redundant approval steps or irrelevant CRM fields—freed up significant sales time. Management is expected to create time by reducing friction, not adding tools. A clear mandate: simplify before scaling.

Executive Summary: Roundtable Discussions – Salesperson Expectations & Capability Building

Table 3 – Four Key Discussion Themes

1. Salespeople Must Be Chameleons, Yet That's Unsustainable

Sales are expected to master a wide spectrum—from hunting and farming to technical fluency and business acumen across different stakeholder types. The cumulative expectation for broad versatility creates fatigue and inconsistency in execution.

2. From Inside-Out to Outside-In Thinking

Participants agreed that many organizations are still too internally focused. There’s a growing need to reframe sales conversations based on customer goals rather than internal products or messaging. Empathy and curiosity must drive customer discovery, not scripted pitches.

3. Role Specialization Is a Necessary Evolution

To alleviate the strain, many firms are splitting responsibilities among SDRs, dealmakers, technical sales, and account managers. This structure enables deeper specialization, better alignment to sales cycle phases, and stronger focus on delivering value through collaboration.

4. Sales Enablement Must Serve All Customer-Facing Roles

It’s not enough to only train salespeople. Customer success, operations, consultants—all must be equipped to have customer-centric conversations. Upskilling is being expanded across these roles to ensure consistent value communication and uncover new opportunities during delivery and support.

Table 4 – Four Key Discussion Themes

1. Behavioral Mindset Shifts Are More Critical Than Tools

Participants emphasized that while tools and data are available, the adoption depends on how well salespeople understand their purpose. Many reps treat tech (e.g., CRM, AI tools) as a burden rather than a lever, simply because the ‘why’ hasn’t been clearly translated into daily relevance.

2. Qualify Hard, Disqualify Fast

Increased sales complexity has made it crucial to **prioritize time and effort**. Sellers need confidence and support to walk away from poor-fit opportunities. A clear and actionable value proposition empowers reps to know when and where they can win—reducing wasted pipeline energy.

3. Redefining the Role of Sales Around Value Realization

Especially in recurring and complex solution environments, it's not enough to sell once. Salespeople must ensure that **customers realize the promised outcomes**—or upselling becomes nearly impossible. Some firms reinvolve sales in post-sale reporting or value confirmation to close the loop.

4. Prepare Reps to Engage Buying Groups, Not Personas

Modern buying involves multiple roles, each with distinct KPIs and motivations. Teams discussed the importance of training reps to **tailor conversations based on role dynamics**, not job titles. AI and data tools were seen as useful for preparing context-rich conversations—but only if sellers are coached on how to use them meaningfully.