

Roundtable Discussions: Key Insights

If you'd rather read the raw notes with more detailed context behind each comment, you'll find those starting on page 7

1. Timing & Early Influence

The “Late Entry” Problem

Being “early” in the sales process only matters if you remain proactive throughout. Many salespeople gain early access but fail to capitalize by not influencing specifications or steering discussions while opportunities remain fluid. Early entry without continued influence leads to the same losing position as arriving too late.

Specification Selling as Long-Term Strategy

Organizations that dedicate resources to influencing specifications years before deals close create near-automatic wins with minimal price pressure. Success requires:

- Separating specification work from transactional selling
- Patience and organizational buy-in
- Structuring compensation around specifications captured, not just closed revenue
- 4+ year horizons in complex markets (e.g., public sector)

Pre-emptive Influence Tactics

- Identify who will write future tenders and shape their criteria early
- Produce "neutral" white papers and resources that educate buyers on criteria favoring your strengths
- Engage before active projects exist to influence buying criteria rather than just responding to them

Key Insight: *True early engagement means understanding customer context before talking about solutions. When budgets and specifications are fixed, price becomes your only lever.*

2. Motivation & Incentive Design

The Short-Term vs. Long-Term Tension

When products historically “sell themselves”, complacency grows and sellers lose motivation to influence new specifications. The core conflict: investing time in long-term specification work that pays off years later versus hitting immediate targets and bonuses.

What Actually Motivates Sellers

Financial bonuses matter less than:

- Feeling valued and supported by management
- Public recognition and visible credit for effort
- Being invited to present success cases
- Having someone "stand up for them" during long cycles
- Clear expectations and acknowledgment of effort, even when results take time

Compensation System Design

Incentive structures drive behavior:

- **Sales-only targets** → Focus on closing fast over building influence
- **Specification KPIs** → Shift toward strategic, long-term engagement
- **Team-based bonuses** → Enable loyalty and account nurturing
- **Growth in key accounts** → Encourage relationship building

Key Insight: *Incentive design is one of the few levers managers truly control. What you measure and reward directly shapes seller behavior.*

3. Leadership & Management Approach

Service-Oriented Leadership

The most effective sales managers:

- Act as enablers, not performers
- Remove friction and mediate between departments
- Protect salespeople's time from internal bureaucracy
- Build authority through service before raising expectations
- Roll up sleeves to fix operational issues, not to take over deals
- Coach without confusing it with deal takeover

Building Trust-Based Accountability

A humble, service-oriented stance earns deep respect. Once credibility is established through helping unblock issues, leaders can gradually raise expectations. Authority built through service creates stronger performance than authority imposed through control.

Management Patience as Critical Success Factor

Long-term success requires management trust even when targets are missed year after year. In one case, four years of missed targets in public sector led to substantial wins once the strategy matured. Trust and long-term mindset enable persistence.

Key Insight: *"Laziness" among reps is often not attitude but consequence of unclear expectations, lack of recognition, or cultures that only reward short-term wins.*

4. Talent & Capability Requirements

The Rare Specification Seller Profile

Long-term specification selling demands:

- Technical competence
- Commercial sharpness
- Patience to build relationships over years
- Ability to navigate long, uncertain cycles

This combination is increasingly hard to find and doesn't fit companies expecting short-term performance. Company culture must accommodate this profile or risk setting them up for frustration.

Revealing True Sales Capability

Effective recruitment practice: Require shortlisted candidates to return for a second meeting to present a mock pitch or product launch. Then give 20 minutes to improve based on feedback to test coachability. Roughly half fail this step, revealing who can actually listen, structure, and engage versus just talk.

5. Sales Enablement & Execution

The Materials Mismatch

Companies equip sellers with materials focused on product features and benefits, but early-stage customers aren't interested in those details. Many sellers think they discuss "requirements" but actually pitch products, missing opportunities to explore strategic pain points.

Problem: Organizations mistake interest for intent, chasing every inquiry instead of daring to say no early.

Solution: "A quick no is also a win" – clarity saves energy and resources.

CRM & Data Discipline

Misused or incomplete CRM systems force teams to operate on gut feeling rather than structured data. Sales enablement starts with data discipline: clean systems that clarify where time creates most impact.

Qualification Over Volume

- Abundance of demand can be a curse without frameworks to distinguish buying intent from technical interest
- Job titles alone don't predict influence – buying power is distributed across unexpected roles
- In prospecting, reaching 20 stakeholders in one account proved more effective than targeting single contacts
- Awareness builds laterally within organizations through unexpected channels

6. Specialization & Focus

The Power of Laser Focus

Focusing each internal team (sales, onboarding, success, performance) on a single, clearly defined audience drastically improves results. When sales handled everything, performance suffered. Specialization created higher retention and conversion rates.

Not All Customers Deserve Equal Effort

Shift from treating every lead the same to:

- Distinguishing superficial interest from long-term potential
- "We don't sell anything, we facilitate" mindset
- Enabling decisions rather than pushing deals

- Prioritizing based on strategic fit, not just responsiveness

7. Retention & Renewal Strategies

Navigating Tender Constraints

In industries with mandatory re-tendering, even satisfied customers must return to market. Successful tactics:

- Direct contact with individual entities under purchasing consortia after losing tenders
- Convince them to rejoin under different structures
- Preserve business continuity through informal follow-up and personal relationships even when formal rules block retention

Compensation for Loyalty

When salespeople are only rewarded on short-term revenue (not preparing for renewals), it disincentivizes long-term account nurturing. Team-based bonuses or KPI systems focused on existing customers create more loyalty-driven behavior.

8. Market Positioning Challenges

Brand vs. Individual Expertise

In consulting markets, obsession with individual expertise over brand value makes it difficult to scale consistent service experiences. Clients say "I want this specific person," reducing differentiation to price.

Challenge: Brands built on talent networks must communicate collective reliability – creating structure and continuity even when teams are fluid.

The Commoditization of Personalization

While AI tools enable hyper-personalized outreach, these tactics risk becoming commoditized. The novelty of tailored emails fades once everyone automates personalization.

9. Core Philosophy: Orchestration Over Tactics

The ultimate takeaway: Managing all moving parts – sales, service, influence, and timing – in a coordinated way creates continuous engagement rather than isolated transactions.

Retention and growth are not about single tactics, but about aligning:

- People
- Incentives
- Messaging
- Timing

...toward an ongoing relationship cycle.

Quick Reference: Key Principles

1. **Early influence beats late entry** – but only if you stay proactive
2. **Separate specification work from transactional selling** – different timelines, different profiles
3. **Recognition matters as much as compensation** – people need to feel valued
4. **Build authority through service, not control** – earn respect before raising expectations
5. **Test coachability in hiring** – mock presentations reveal true capability
6. **Focus on intent, not just interest** – qualify ruthlessly, say no quickly
7. **Clean data enables smart prioritization** – CRM discipline is foundational
8. **Specialize teams by audience** – laser focus improves outcomes
9. **Influence criteria before responding to RFPs** – shape the game, don't just play it
10. **Orchestrate continuously** – align all elements toward ongoing relationships

Questions? Or want us to challenge you on any of the above topics? Feel free to reach out to inquiry@perpetos.com.

Raw Notes from the Tables

One participant reflected on the “late entry” problem, explaining that even when salespeople are involved early, they often fail to capitalize on that advantage by not influencing specifications or steering discussions when the opportunity is still fluid. **The insight was that being early only matters if sales also stay proactive throughout the process** – otherwise, they end up in the same losing position as those who arrived too late.

A sales leader shared that in teams where product specifications have long been aligned to their offering, complacency tends to grow. When products “sell themselves,” sellers lose the motivation to influence new specifications. The real conflict arises between investing time in long-term specification work that pays off years later versus hitting short-term targets and bonuses. **Balancing that tension between short-term revenue pressure and long-term market influence emerged as a recurring theme.**

Someone described a company where one person is fully dedicated to influencing specifications years before any deals are signed, and **their bonus depends purely on the number of projects where the product gets specified, not on closed revenue.** This long-term approach requires patience and organizational buy-in, but it produces near-automatic wins down the line with little price pressure. It highlighted how powerful it can be to structurally separate specification work from transactional selling.

Several participants stressed that such **long-term “specification selling” demands a rare profile – technically competent, commercially sharp, and patient enough to build relationships over years.** This combination is increasingly hard to find and doesn’t always fit within companies that expect short-term performance. One insight was that the company culture itself must be ready to accommodate that kind of profile, otherwise it sets them up for frustration.

A recurring frustration was **“laziness” or passivity among sales reps, which often turned out not to be pure attitude but a consequence of unclear expectations, lack of recognition, or a culture that rewards only short-term wins.** One participant noted that motivation often depends less on financial bonuses and more on feeling valued and supported by management – someone “standing up for them” and acknowledging effort even when results take time.

There was a strong recognition that **patience from management is critical.** A participant working in the public sector described how it took four years to see first results after entering a complex institutional market, despite missing targets year after year. What made it work was management’s trust and long-term mindset, which allowed them to persist and eventually deliver substantial wins.

Multiple participants emphasized that **companies often equip sellers with materials that focus on product features and benefits, while in early stages, customers are not**

interested in those details. A participant noted that many sellers think they discuss “requirements,” but in reality, they’re pitching their product – missing the opportunity to explore the client’s strategic pain points. The insight was that true early engagement means understanding the customer’s context before talking about solutions.

Another participant highlighted how **motivation systems can drive very different behaviors.** If targets and bonuses focus solely on yearly sales figures, sellers naturally prioritize closing fast over building long-term influence. When objectives include measurable growth in key accounts or new specifications, behavior shifts toward more strategic engagement. Incentive design was repeatedly mentioned as one of the few levers managers truly control.

Several participants shared that recognition and appreciation can be as powerful as money. Being publicly acknowledged, invited to present success cases, or simply receiving visible credit for effort made a tangible difference in motivation. The conversation underlined that emotional rewards and “feeling seen” are essential, especially for those engaged in long, uncertain sales cycles.

Leadership behavior came up as a major factor in shaping culture. One manager earned deep respect by taking a humble, service-oriented stance – helping sellers unblock operational issues rather than “teaching them how to sell.” Once that credibility was established, he gradually raised expectations and accountability. This showed that **authority built through service creates much stronger performance than authority imposed through control.**

Another participant reinforced that the best sales managers act as enablers, not performers. They help remove friction, mediate between departments, and protect salespeople’s time. Coaching only works if it’s not confused with taking over the deal. Sellers respect leaders who roll up their sleeves to fix things, but only if those same leaders also hold them accountable once trust is built.

Someone shared a **recruitment practice that significantly reduced hiring mistakes: every shortlisted candidate must come back for a second meeting to present a mock pitch or product launch.** It immediately reveals if they can listen, structure, and engage rather than just talk. They also added a coaching moment – giving the candidate 20 minutes to improve based on feedback – to test coachability. Roughly half failed that second step, showing how revealing this simple test can be.

Another participant in consulting reflected that the market’s obsession with individual expertise over brand value makes it difficult to scale a consistent service experience. He noted that clients often say “I want this specific person,” reducing differentiation to price. **The takeaway was that brands built on talent networks must find ways to communicate collective reliability** – creating structure and continuity even when teams are fluid.

Someone who transitioned from large-scale software sales to a technical startup shared that their company generates strong inbound demand but struggles with conversion. The problem wasn't awareness – it was qualification. Leads often came from people who were curious, not buyers. **The insight was that abundance of demand can be a curse if there's no clear framework to distinguish genuine buying intent from technical interest.**

Another shared that in prospecting, reaching out to many stakeholders within one account proved more effective than targeting single contacts. By messaging 20 people in a company, he noticed that unrelated individuals from those firms started engaging online, showing how awareness builds laterally within organizations. **The key insight was that job titles alone don't predict influence – buying power is often distributed across unexpected roles.**

Several participants observed that **while AI tools now enable hyper-personalized outreach, these tactics risk becoming commoditized.** The novelty of receiving a tailored email fades quickly once everyone automates personalization.

Several participants highlighted how misused or incomplete CRM systems limit sales visibility and prioritization. One sales leader explained that their team was operating on gut feeling rather than structured data. **The consensus was that sales enablement starts with data discipline: clean systems that clarify where time creates the most impact.**

A recurring reflection was that many organizations mistake interest for intent. Someone noted that they often chase every inquiry instead of daring to say no early. Another agreed, adding that **“a quick no is also a win,”** since clarity saves energy and resources. This was widely acknowledged as a mindset shift toward efficiency and focus rather than endless pursuit.

One participant emphasized that early-stage conversations should be advisory, not transactional. He described how his team lost deals because they entered too late in the buying cycle, only when budgets and specifications were fixed. By then, their only lever was price. **The learning was that influencing the customer's criteria early – even before there's an active project – creates far more leverage later.**

Another participant noted that focusing each internal team (sales, onboarding, success, performance) on a single, clearly defined audience drastically improved results. Early on, when sales handled everything, performance suffered. **Specialization with “laser focus” across teams created higher retention and conversion rates.**

In industries governed by tenders, a participant explained how the biggest retention challenge is the mandatory re-tendering process. Even satisfied customers are forced to go back to market. One tactic that worked was to directly contact every individual entity under a purchasing consortium after losing a tender, convincing them to rejoin under a different structure. **The insight was that even when rules block formal retention, informal follow-up and personal relationships can still preserve business continuity.**

A strong insight emerged around influencing decision-making early. One participant explained that they **actively identify who will write future tenders and what criteria they will include – sometimes even helping shape these documents long before the process starts.** Another shared that they produce white papers and websites that seem neutral but actually educate buyers on criteria favoring their strengths, generating both influence and qualified leads months in advance.

Compensation systems appeared to either enable or block loyalty efforts. One participant admitted their salespeople were only rewarded on short-term revenue, not on preparing for future renewals, which disincentivized long-term account nurturing. Others shared how team-based bonuses or KPI systems focused on existing customers created more loyalty-driven behavior.

There was consensus **that not all leads or customers deserve equal effort.** One participant said they plan to stop treating every lead the same, realizing that **some show superficial interest while others signal long-term potential.** Another phrased the same learning as “we don’t sell anything, we facilitate” – highlighting a mindset shift from pushing deals to enabling decisions.

In the end, **several participants converged on “orchestration” as the key takeaway:** managing all moving parts – sales, service, influence, and timing – in a coordinated way that creates continuous engagement rather than isolated transactions. It reflected a recognition that retention and growth are not about single tactics, but about aligning people, incentives, and messaging toward an ongoing relationship cycle.

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