A TRANSFORMING SALES RESULTS EBOOK

A Revenue Leader's Guide to Diagnosing What's Limiting Growth

Find the one thing to fix first

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Transforming
SALES RESULTS™

START HERE

What this is

If you're behind plan, you already have a theory about why. Most leaders do. The useful question is whether your theory is right, and whether you'd find out if it wasn't.

This guide gives you a structured way to check. It covers the three places revenue performance usually breaks down, the symptoms and metrics that tell you which one you're in, and a short self-assessment you can work through on the spot.

It won't fix your sales team. It will tell you where to look first, and that decision determines whether the next two quarters of effort produce anything worth reporting.

About 20 minutes to read.

The self-assessment is on page 13. You can skip straight to it, but the pages before it are what make your answers reliable.

THE PROBLEM

Most sales improvement fixes the wrong thing

Here's a pattern I've watched for thirty years.

Revenue falls short of the objective. Leadership diagnoses the problem in a meeting, usually from whichever symptom is making the most noise that week. Pipeline looks thin, so the answer is more prospecting. Deals are stalling, so the answer is a closing course. The team gets trained, everybody works hard at it, and two quarters later you're having the same conversation.

The training usually wasn't the problem. It was aimed at something that wasn't limiting performance.

The second cost

You've now spent your team's attention and your own credibility on something that didn't work, and everyone noticed.

The next initiative starts from a worse position than this one did, because your people have learned that improvement efforts don't produce much around here.

THE PRINCIPLE

Take your foot off the brake before you press the accelerator

Every system has forces pushing it forward and forces holding it back. When the restraining forces are strong enough, adding driving force doesn't produce speed. It produces tension, cost, and wear. This is Force Field Analysis, and it applies to a sales force as readily as it applies to a single account.

DRIVING FORCES	RESTRAINING FORCES
More prospecting activity	Undefined ideal customer profile
Higher quotas and targets	Discovery that stays on the surface
New tools and technology	Managers who were never taught to coach

Pressing harder on the accelerator while the brake is still engaged is how a sales force ends up busy, expensive, and flat.

FIRST QUESTION

Is this even a sales problem?

Worth asking honestly before you spend anything. Sometimes what looks like a selling problem starts upstream, and no amount of sales improvement will completely fix it.

Market

Is demand contracting for everyone, or only for you? If competitors are growing, it isn't the market.

Product

Do buyers name specific capability gaps, or are you losing on how the case was made?

Pricing

Are you losing on price to similar competitors, or losing to No Decision, which is rarely about price?

Marketing

Is the top of the funnel starved of qualified interest before sellers ever touch it?

If the answer is upstream, fix that first. If it's none of these, it's very likely capability and execution inside the sales force, and buyers have been saying so for years.

What B2B buyers say about the sellers they meet

33% of buyers feel that sellers are well-informed

25% of buyers think reps are effective at engaging their executives

60% of buyers question their sales rep's integrity

27% of buyers say salespeople can translate business data into insights

THE MAP

The three places growth gets limited

In B2B sales forces, the limit is nearly always in one of three places. Most organizations have weakness in all three, which is normal and isn't the point. The point is which one, fixed first, produces the most revenue in the least time.

Pipeline Creation

You aren't starting enough quality conversations with the right buyers. Everything downstream is starved.

Opportunity Conversion

You're having conversations, but too few turn into revenue, or they take too long and cost too much margin along the way.

Account Expansion

You keep your customers and you don't grow them. Revenue that should compound sits flat.

Each one feeds the next, which is why a weakness early in the sequence shows up as a symptom later.

The next six pages help you tell them apart.

Examples in this guide use Nuvanta AirTech, a composite of real clients and situations. The numbers are real. The company isn't.

How to tell if it's here

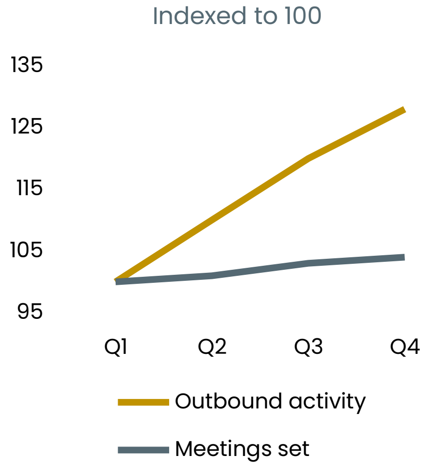
What you'll observe

Activity is up and nothing else is. Your reps are making the calls and sending the emails, and the meeting count sits where it sat last quarter. You'll hear that the market is soft, or the list is bad, or cold outreach doesn't work in your industry, and meanwhile you can watch a competitor getting the meetings.

The meetings you do get are with the wrong people, or with people who were never going to buy anything.

What to check

- Meetings set per rep over two quarters, against activity volume
- What percentage of first meetings become qualified opportunities
- Whether your best three reps work the same list as everyone else and get different results
- Net-new logos this year against last



The Tell: activity climbing while meetings stay flat. Volume is an amplifier, not a fix. It multiplies whatever effectiveness is already in the system, so when targeting is loose and messaging is about your product, more activity just delivers mediocrity faster.

Nuvanta AirTech increased outbound activity by 28% over four quarters. Meetings set rose 4%.

What good looks like

Teams that create pipeline consistently do a few unglamorous things well.

1. They're specific about who they're going after. Not a vertical and a headcount range, but roles, goals, and what those people are measured on.

2. They build messaging around the buyer's problems and desired outcomes instead of their own products. A seller can say in one sentence why this person should care this quarter.

3. They sequence across channels on purpose, building awareness, interest, and relationship, rather than accumulating touches to satisfy a dashboard.

4. And when a buyer says no, they can tell a real no from a reflex, and they respond to each differently instead of treating both as the end.

What changes: more qualified conversations, better-fit opportunities entering the pipeline, less wasted seller effort. It's also the fastest place to see whether something is working.

How to tell if it's here

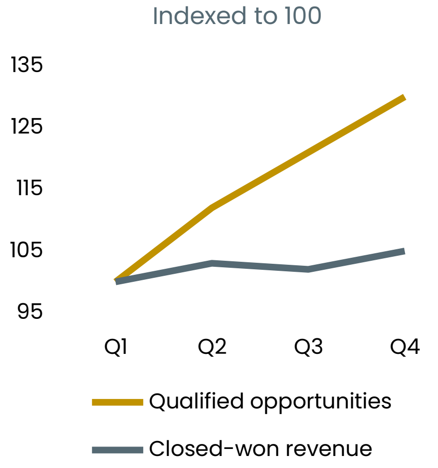
What you'll observe

Plenty going in at the top, not enough coming out at the bottom. Deals park themselves in the middle stages. Forecast confidence is poor enough that you've started discounting your own reps' calls in your head. Discount approval requests come across your desk more than they used to.

And you're losing to No Decision more often than to anyone you could name.

What to check

- Win rate on qualified opportunities, and whether it has moved
- Losses to No Decision as a share of all losses
- Sales cycle length, and where deals sit longest
- Average discount, and the trend
- Forecast accuracy at 30 and 60 days



The Tell: healthy top-of-funnel numbers next to a win rate that won't move, or a forecast that keeps surprising you in the same direction. Deals that die slowly usually died in discovery, months before anybody started paying close enough attention.

Nuvanta AirTech's win rate looked respectable at 41%. But 62% of the deals forecast for the quarter slipped at least once, and No Decision beat every named competitor combined.

What good looks like

Winning more isn't about pushing harder. It's about matching how your buyers actually buy.

1 Discovery surfaces the buyer's current state, their desired future state, and the business impact of the gap between them. Your sellers know what solving it is worth in the buyer's numbers, not yours.

2 Qualification is rigorous enough that the forecast stops surprising you.

3 Sellers know who's involved in the decision, what each of those people needs, and what has to be true before the buyer can move to their next step. They're navigating the buyer's process, not just running their own.

4 And they connect what you sell to the outcomes each buyer is personally measured on, which is what lets a business case survive the CFO.

What changes: higher win rates, shorter cycles, less discounting, a forecast you can use, and more revenue out of the pipeline you already have.

How to tell if it's here

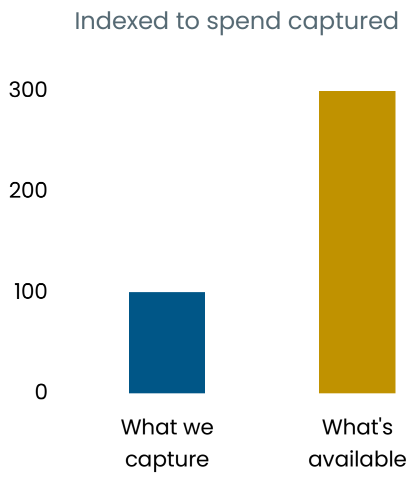
What you'll observe

Churn isn't your problem. Growth is. Your customers are satisfied, they renew, and they spend roughly what they spent last year.

The account plans, if they exist, were written in January and nobody has opened one since. Your sellers know their two regular contacts extremely well and know almost nobody else in the building. Expansion revenue shows up when a customer asks for it rather than when you propose it.

What to check

- Net revenue retention, separated from gross
- Existing-account revenue versus new logos
- How many of your top twenty accounts grew more than 10%
- Referrals and introductions per account
- Whether account objectives came from account data



The Tell: strong retention with flat growth in the same accounts that have growth potential. Growing an account that you already have costs a fraction of winning a new one, and you're leaving that money on the table.

Nuvanta AirTech retained 94% of revenue and grew account revenue 3%. Their five largest accounts had addressable category spend roughly three times what Nuvanta was capturing.

What good looks like

Retention isn't growth. Growing an account takes the same discipline as winning a new one, applied to people who already trust you.

1. Objectives get set from account data. What does this customer spend in your category, where are they spending it now, and what's realistic to capture this year?

2. Account plans are living documents with named actions and dates, and they change during the year because the account changed.

3. Sellers map the account beyond their comfortable contacts, understanding roles, influence, and attitude across the organization.

4. And Customer Value Reviews reinforce the value already delivered, surface problems before they become churn, and open the next conversation. They aren't check-ins.

What changes: durable, higher-margin revenue at a lower cost to acquire, and growth you can plan instead of growth that happens to arrive.

Twelve questions about your sales force

Rate each statement about your sales force as it actually operates, not as it's designed to operate.

4 = Consistently **3 = Usually** **2 = Sometimes** **1 = Rarely or never**

Pipeline Creation

1. Our sellers work from a clearly defined ICP and personas, including roles, goals, and typical COIN-OP.
2. Our outreach messaging is problem- and outcome-centric and tied to our ICP and personas, rather than product-centric.
3. Sellers use multichannel sequences designed to build Awareness, Interest, and Relationship, not just to hit touch counts.
4. We measure the quality of the pipeline our prospecting creates, not just activity volume.

Opportunity Conversion

5. Discovery reliably uncovers the buyer's current state, desired future state, and needs.
6. Sellers use a structured qualification approach to confirm fit and viability before investing heavily in an opportunity.
7. Our sales process and seller tasks align with the buyer's stages, and sellers work to satisfy the buyer's exit criteria at each stage.
8. Sellers connect solutions to the outcomes and priorities that matter most, in the value language that resonates with each buyer.

Continued...

Account Expansion

9. We set data-driven objectives for the accounts we intend to grow.

10. Account plans are documented, actionable, and actually executed, not created and shelved.

11. Account managers map the account landscape, identifying roles, influence, and attitudes across stakeholders.

12. We lead regular Customer Value Reviews that reinforce value delivered, resolve issues, and uncover new opportunities.

These twelve questions are drawn from the full 29-question Sales Effectiveness Diagnostic, using the same four-point scale.

Scoring your answers

Total your score for each of the three sections. Then compare the three.

13 – 16	Strong. Room to sharpen, but this isn't your biggest constraint.
9 – 12	Inconsistent. Some sellers do this well, most don't.
4 – 8	This is likely the biggest constraint on your growth.

Your lowest-scoring section is your working hypothesis, as long as it's clearly lower. A one- or two-point gap on twelve questions isn't a real difference.

If your three totals are close

Don't split hairs. Work left to right, since Pipeline Creation feeds the other two and an early weakness shows up later as a symptom. Emergency medicine sorts the same way, by what limits the patient first rather than by what's most visible. If you'd rather not guess, the full diagnostic and a Situation Assessment will separate them properly.

A hypothesis isn't a diagnosis

What you have now is useful, but incomplete. Twelve questions answered by one person reflect one vantage point. Your sales managers would answer differently. Your reps would answer differently again, and the gaps between those answers tell you something.

Before you commit budget and a quarter of your team's attention, test the hypothesis three ways.

Against your data

Do the metrics on pages 7, 9, and 11 point where your score points? When they disagree, the data wins.

Against other people

Ask your managers and a sample of reps the same twelve questions. Compare the answers, and pay attention to where they diverge.

Against root cause

A low score tells you where. It doesn't tell you why. The same weak discovery can come from a skill gap, a broken process, a hiring profile, a comp plan rewarding something else, or managers who were never taught to coach.

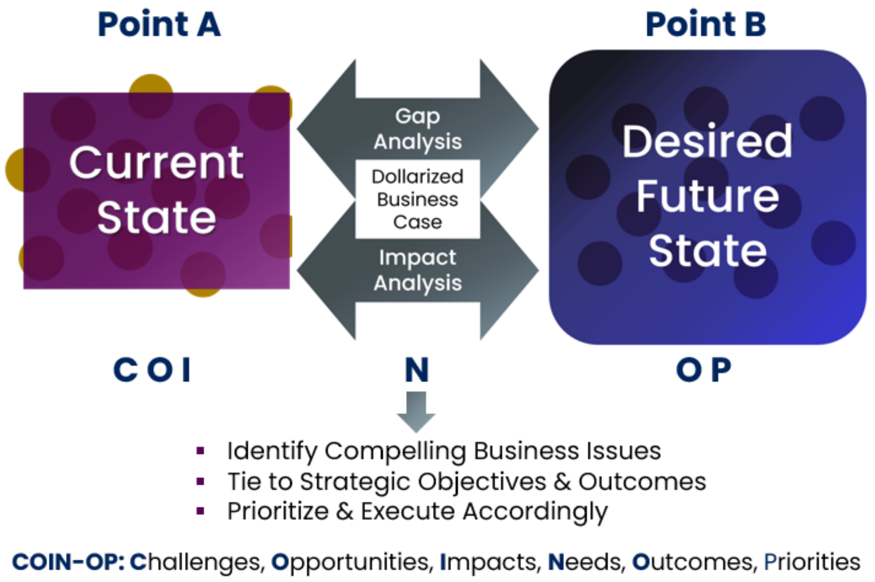
Each of those has a different fix, and only one of them is training. Skipping this step is how organizations end up trying to train their way out of a problem that training was never going to solve.

THE METHOD

How to confirm it properly

A proper confirmation is a structured Situation Assessment. Here's the shape of it, if you want to run one yourself.

1. **Start with context.** Who sells what, to whom, and how. Different motions fail in different ways.
2. **Document the current state.** Challenges, opportunities, and the impact of leaving each one alone. Quantify wherever you can.
3. **Document the desired future state.** The outcomes you need and their priority, tied to your executive team's objectives.
4. **Analyze the gap.** What would it take to close the distance, and what's it worth in dollars if you do?



That last question is what turns a diagnosis into a business case. It's also the first thing your CFO will ask.

THE FIX

What a focused intervention looks like

Once you know where the limit is, the fix can be narrow. That's what makes it faster than many fixes.

I run these as Revenue Acceleration Sprints, one for each of the three areas in this guide. A Sprint runs about a quarter, delivered virtually, structured as weekly working sessions rather than an event. Sellers do short pre-reading, come to a live session to work through it, and leave with something to apply that week. Managers get coaching points to reinforce it between sessions and afterward.

A Sprint is built to produce adoption and mastery, not just instruction. Spreading the work across a quarter, bringing managers in from the start, and building reinforcement into the operating cadence is how a team goes from knowing something to doing it.

The design matters as much as the content.

- What gets asked about gets focus.
- What gets measured gets done.
- What gets integrated into workflow gets adopted.
- What gets coached gets mastered.
- What gets adopted and mastered moves the needle.

The **CoNavigator** Method™ | B2B Sales Mastery

If more than one area needs work, or you want the whole system stronger, the full CoNavigator Method for B2B Sales Mastery covers all of it.

What it takes to make this work

Worth knowing before you start, because the commitment is the variable that most affects your result.

From your Sellers

Short pre-reading before each module and one live working session a week, across a quarter. The sessions replace selling time, so they have to be worth it, which is why the work is applied rather than theoretical.

From your Managers

This is the one that decides your outcome. Managers attend first, get coaching points for each module, and reinforce between sessions. Without that, you get a well-trained team and an unchanged number.

From You

Remember, your team takes its cue from you. If you disengage after week three, or when month-end is tight, so will everyone else. There will be short-term pressures. This is a long game.

On cost

Pricing depends on how many people you're developing, how many cohorts that takes, and whether you're addressing one area or several. It's quoted per Sprint and it's fully transparent once we've scoped it. If the assessment points at something a Sprint doesn't address, like a comp plan pulling behavior the wrong way or a hiring profile that doesn't match the job, that's worth fixing separately, and I'll say so. What I won't do is sell you training for a problem training can't solve.

What results have looked like

12–34%

revenue lift within six to nine months, for clients who implement with discipline. Most see real movement in win rates, quota attainment, sales velocity, and account growth.

That range is wide, and there's a reason.

The spread comes down to execution. CSO Insights and other studies over the past ten years found the same pattern. When methodology adoption passes 75%, revenue plan attainment rises by up to 15.3%, quota attainment by 31.8%, and win rates on forecast deals by 30%. There's another significant jump at 90% adoption.

The organizations at the top of the range did the reinforcement work. Their managers coached to it every week, and the methodology was integrated into the workflow. The ones at the bottom did more than treat it as an event on the calendar, but not enough to get the full return.

Content quality and instructional design get you to the starting line. Adoption determines where in that range you land.

NEXT

Two ways forward, depending on where you are

Both start from what you just scored.

If you want a fuller picture before you talk to anyone

The full Sales Effectiveness Diagnostic covers all three areas across 29 questions and gives you a scored profile with your primary constraint identified. Eight to ten minutes. No cost, and nothing is sent to you unless you ask.

▶ **Click here to take the full diagnostic**

If you'd rather talk it through

Thirty minutes. Bring your scores and your data and we'll work through whether they agree, and what a focused fix would involve. If the constraint isn't something I can help with, I'll tell you that on the call.

▶ **Click here to schedule a meeting to discuss your results.**

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Mike is an internationally recognized expert on sales enablement, sales effectiveness, sales coaching, and sales management. He's spent more than thirty years helping companies drive revenue growth through proven sales systems and enablement strategies.

He's the author of *The Building Blocks of Sales Enablement* and the creator of The CoNavigator Method, which spans B2B Sales Mastery, Sales Coaching Mastery, and Sales Management Mastery. All three are available now as training programs. The first book in the series, *The CoNavigator Method for B2B Sales Mastery*, releases in Q4 2026, with the other two following in 2027.

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