



Mercuri International

Sailing into 2026 – Navigating Uncertainty

**European B2B Sales Sentiment 2026 – What sales leaders
in DACH, Benelux, France, and UK are doing to create
momentum under pressure**

EXECUTIVE SUMMARY: “NAVIGATING UNCERTAINTY”

2025 was not a good year for European B2B sales – but 2026 might be.

In a time when many sales leaders are still navigating cost pressure, customer hesitation, and ongoing geopolitical volatility, our survey reveals something surprising: **confidence is stabilising.**

Across Europe, more than **two-thirds of respondents missed their targets in 2025**, yet the **majority expect improvement in 2026**. This gap between results and readiness isn't ignorance – it's **adaptation.**

Outlook is no longer driven by performance. It's driven by sentiment.

Our data shows that **achievement has little to no direct correlation with future outlook**. Instead, leaders are operating from **confidence in their ability to adjust**, not just from past results.

This marks a shift from **reaction to resilience** – from waiting for calm seas to learning to sail through storms.

The focus is shifting from grand strategy to real execution.

Enablement, customer recovery, and process improvement top the list of strategic initiatives. Growth is still on the table – but it's being pursued with more **discipline than drama.**

The direction is clear: **strengthen the ship before chasing the horizon.**

EUROPE IS NO LONGER IN FIREFIGHTING MODE – IT'S SAILING INTO STRUCTURED UNCERTAINTY.

Across regions and industries, we see a movement away from panic and toward **calm, focused leadership.**

The strategies are more grounded. The ambitions more cautious. But the determination? Undeniable.

This report is your radar.

We surveyed around **300 sales leaders across DACH, France, Benelux, and the UK**, analysing how sentiment, performance, and strategy align – and where they don't.





MARKET MOOD & MISSED TARGETS

“Confidence returns – even if performance hasn’t.”

THE PERFORMANCE GAP

When we asked over 300 European B2B sales leaders how their teams performed in 2025, the result was sobering: **69% of respondents failed to meet their sales targets**, and nearly a third reported coming in more than 10% below plan. In fact, only **one in four companies exceeded expectations**.

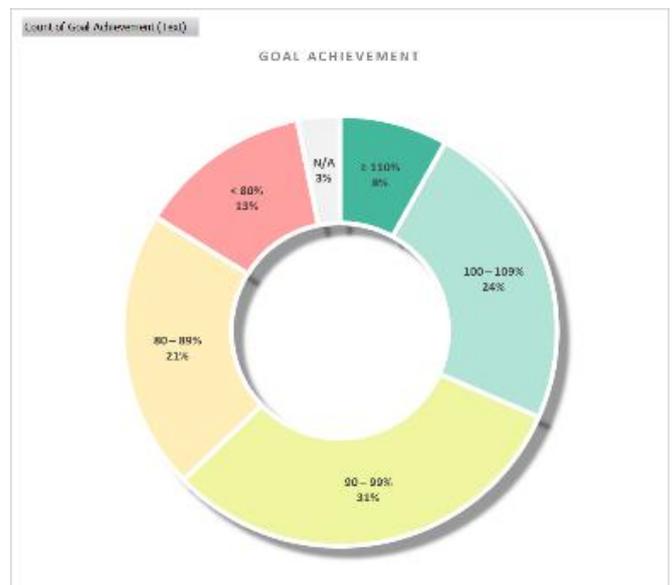
We asked 5 simple questions and got honest responses:

- Will you achieve your budget goals in 2025? (**Achievement**)
- What is the sentiment in your sales organisation right now? (**Sentiment**)
- How are you looking towards 2026? (**Outlook**)
- Which external factors impact your outlook?
- Which strategic initiatives will you address in 2026 to be successful?

Inside, you’ll find insights into:

- How external pressures shape internal choices
- What strategic patterns are emerging
- Where different regions stand on readiness, resilience, and risk
- And what separates the calm from the drifting

At **Mercuri**, we help sales leaders **turn sentiment into action** – with the enablement, training, and strategic execution needed to sail forward with confidence.



This isn’t exactly a surprise. Across industries, 2025 was shaped by **persistently high cost pressure, ongoing customer reluctance**, and geopolitical turbulence that made even short-term planning difficult.

The year wasn’t defined by collapse – but by stagnation, **friction**, and a lack of commercial momentum.

Underperformance could have triggered pessimism — the data shows, leaders are shifting to *control what they can control*: focus, routines, and execution.. Despite the pressure, sentiment has held.

- **Average sentiment** entering 2026 is **5.84** (on a 10-point scale)
- **Average outlook** on expected performance impact is **5.53**



Almost identical values were reported a year earlier, when the DACH-only edition of this study showed sentiment at **5.86** and outlook (converted to the same scale) at **5.56**. So, despite more difficult macro conditions and underwhelming results, **confidence levels remain intact**.

At first glance, this seems counterintuitive. But the correlations in the data reveal what's really going on:

- 1 **Achievement and sentiment** are only weakly connected ($r = 0.25$)
- 2 **Sentiment and outlook**, however, show a much stronger relationship ($r = 0.49$)
- 3 There is **no meaningful direct correlation between achievement and outlook** ($r = 0.08$)

In other words: past performance doesn't predict future expectations — **how leaders feel** does.

A deeper statistical view confirms this. When sentiment is factored in, the connection between achievement and outlook disappears entirely.

Outlook is no longer driven by what was achieved, but by what is believed to be possible.

This isn't denial — it's **adaptation**.

After several years of disrupted plans, moving goalposts, and unpredictable markets, leaders have recalibrated. They've come to understand that confidence must be built internally — not outsourced to the economy.

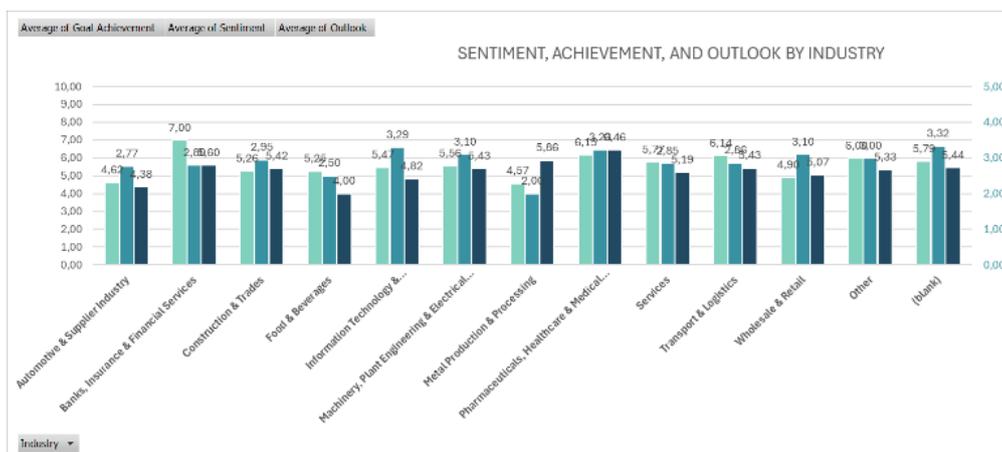
"We didn't hit target — but we've learned. We've adapted. And this time, we're ready."

The performance gap — the space between results and resilience — is not a flaw in logic. It's a strategic response. A new mindset is emerging:

Don't wait for certainty. Build for it.

BREAKDOWN BY INDUSTRY

Not all industries faced 2025 under the same conditions — and they certainly don't view 2026 through the same lens. From cautious realism to renewed confidence, the data shows clear patterns in how performance, sentiment, and outlook align — or diverge — across sectors. These contrasts offer a glimpse into the strategies, expectations, and resilience levels that define each industry's current trajectory.



GROUP 1: High Confidence, High Achievement

“On course and building speed”

These industries combine solid performance in 2025 with strong sentiment and high outlook for 2026.

Typical traits: Clear demand drivers, operational stability, confidence built on real success.

Pharma & Healthcare



Achievement: 3.23 | Sentiment:
6.15
| Outlook: 6.46 (highest)

Interpretation: Stable demand and strategic clarity translate into confidence. Leaders here are optimistic – not despite past results, but because of them.

GROUP 2: Resilient Confidence, Average-to-Low Achievement

“Weathered the storm, confident in the crew”

These industries underperformed in 2025 but report **high sentiment and outlook** nonetheless.

Typical traits: Confidence rooted in recent restructuring, internal capabilities, or market recovery expectations.

Banks & Financial Services



Achievement: 2.80 | Sentiment:
7.00 (highest) | Outlook: 5.60

Transport & Logistics



Achievement: 2.86 | Sentiment:
6.14 | Outlook: 5.43

These sectors may be anticipating a rebound or have made **strategic investments** that haven't paid off – yet. Leaders feel in control even if the numbers haven't caught up.

GROUP 3: Low Performance, Low Sentiment

“Still battling heavy seas”

Sectors that performed poorly and report relatively low confidence.

Typical traits: Impacted by cyclical or structural challenges; confidence is subdued but not absent.

Metal Production & Processing



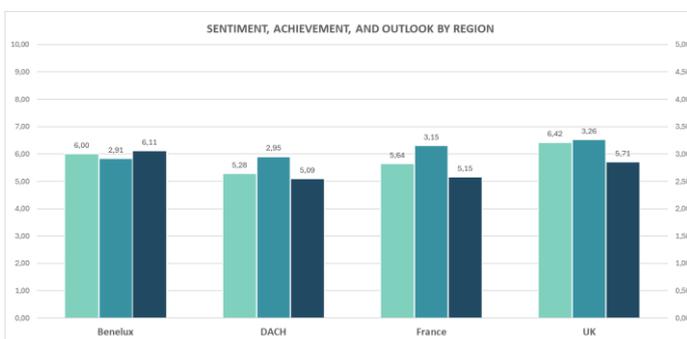
Achievement: 2.00 (lowest) |
Sentiment: 4.57 (lowest) | Outlook:
5.86

This sector reflects the most **honest alignment between performance and mindset** – but the relatively high outlook suggests leaders see a path forward, even if it's not immediate.



BREAKDOWN BY REGION

While sales leaders across Europe face similar macroeconomic pressures, their outlooks, confidence levels, and recent performance suggest **different readings of the same conditions**. Comparing **achievement, sentiment, and outlook** by region reveals how **market dynamics and leadership cultures** shape strategic posture heading into 2026.



Across all regions, the **average goal achievement** hovers just below target (mean range: **2.82 to 3.26**, where 3 indicates 90–99% goal attainment). Yet **sentiment scores range from 5.26 to 6.42**, and **outlook varies even more sharply from 5.08 to 6.15**. The regional analysis reinforces one of the study's central insights:

Sentiment – not performance – is the key predictor of outlook.

Some regions are driving forward based on recent success (UK), others are betting on recovery (Benelux), while a few are choosing a **watchful, defensive course** (DACH, France).

BENELUX – Low Results, High Ambition

● **Achievement:** 2.82 (*lowest*)

● **Sentiment:** 6.06

● **Outlook:** 6.15 (*highest*)



In Benelux, the contrast between **low past performance** and **top-tier outlook** stands out. Despite achieving well below target on average, leaders here show **above-average sentiment** and the **most optimistic outlook** for 2026. This can be interpreted through the region's **lean commercial structures**, where even moderate underperformance is seen as **recoverable through operational agility**. Leaders may also be factoring in **improved cross-border logistics, EU-driven green initiatives, and early restructuring efforts** from 2024 that are expected to pay off. They're sailing into 2026 with hope – but it's not without a plan.



DACH – Performance near Average, Outlook most reserved

- Achievement: 2.85
- Sentiment: 5.26 (*lowest*)
- Outlook: 5.08 (*lowest*)



DACH countries report performance just under average, but pair this with the **lowest sentiment and outlook** scores across Europe.

This reflects the region's **engineering-heavy B2B landscape**, which is currently absorbing **cost increases, declining orders from China, and energy-related disruptions**. Sales leaders in Germany, Austria, and Switzerland tend to favour **conservative planning**, and the data shows a preference for **weathering the storm over chasing growth**. In nautical terms: this region is keeping the sails tight and watching the clouds.

FRANCE – Measured Optimism in a cautious Market

- Achievement: 3.00
- Sentiment: 5.59
- Outlook: 5.11



French sales leaders report performance **right at average**, with sentiment and outlook **slightly below** that mark. The tone is not negative – just **pragmatic**.

France's **regulatory complexity, sensitive labor market, and muted domestic demand** may be driving a more **defensive stance**. Commercial decision-makers appear focused on **stabilizing current business**, avoiding risky bets in volatile sectors, and **preserving customer relationships** in price-sensitive markets.

UNITED KINGDOM – Solid Numbers, High Confidence

- Achievement: 3.26 (*highest*)
- Sentiment: 6.42 (*highest*)
- Outlook: 5.71



UK sales leaders report **the best average performance in 2025**, just over the 100% mark, and match that with **the highest sentiment score** of all regions. While the outlook for 2026 (5.71) is not euphoric, it's clearly optimistic – and notably **anchored in strong past performance**.

This mirrors the UK's current commercial environment: **steady economic rebound**, inflation retreating faster than in other regions, and a **commercial culture that rewards assertive planning**. UK teams seem poised to capitalize on **stabilized demand and internal efficiency gains**.

Excellent – here's a **narrative-style summary** that synthesizes the insight from "Mind Over Metrics" into a clear, compelling message for **sales leaders in 2026**. It stays grounded in the data, reflects the tone of the report, and ends with **concrete implications** and tasks:

LEADERSHIP IN THE GAP

WHAT SALES LEADERS MUST TAKE FROM THIS DISCONNECT

The findings reveal a telling paradox: many sales organizations missed their 2025 targets, yet outlooks for 2026 remain hopeful – in some cases, even ambitious.

This disconnect isn't a failure of logic. It's a sign of **adaptation**.

After years of navigating crises, unpredictable markets, and shifting customer behaviour, sales leaders have learned not to anchor expectations to past performance. They are focusing instead on what they can influence: the **readiness of their teams**, the **resilience of their commercial models**, and the **clarity of their priorities**.

But sentiment without substance is a dangerous passenger.

The confidence seen in this year's survey is only valuable if it translates into action. For sales leaders, this means closing the gap between **how things feel** and **what gets done**.

Implications for Sales Leaders in 2026

1. *Turn optimism into operational readiness*

Hope must be backed by enablement. Equip your teams with the tools, content, and processes that convert sentiment into performance.



2. *Measure what drives momentum*

Focus less on lagging KPIs and more on leading indicators: pipeline quality, customer engagement, sales cycle stability.

3. *Lead with calm, not comfort*

Confidence is not about cheerleading. It's about providing direction in uncertainty – and ensuring your people stay focused on the right battles.

4. *Be ready to act, not just adapt*

Volatility is not an excuse to wait. Sales leaders must sharpen strategic reflexes and foster teams that can **execute mid-storm**.

In a world where sentiment sets the sails, **leadership sets the course**.

The next wave of commercial success will come not from watching the weather, but from mastering the crew.

HIGHLIGHT BOXES

1 “Performance ≠ Outlook”

Sentiment is the strongest predictor of expectations

Even in regions where 2025 targets were missed (e.g. Benelux, DACH), outlooks for 2026 vary sharply – and align much more with how leaders *feel* than what they achieved.

👉 In short: the belief in future performance isn't based on recent success, but on internal confidence.

2 “Benelux: The Bet on Recovery”

Lowest achievement, highest outlook

With an average achievement score of **2.82**, Benelux underperformed the most – but reports the **most optimistic 2026 outlook (6.15)**.

👉 This suggests leaders here see opportunity in adversity and are already repositioning for growth.

3 “DACH Holds the Line”

lowest sentiment and most reserved outlook

Despite near-average performance, the DACH region posts the lowest sentiment (5.26) and lowest outlook (5.08).

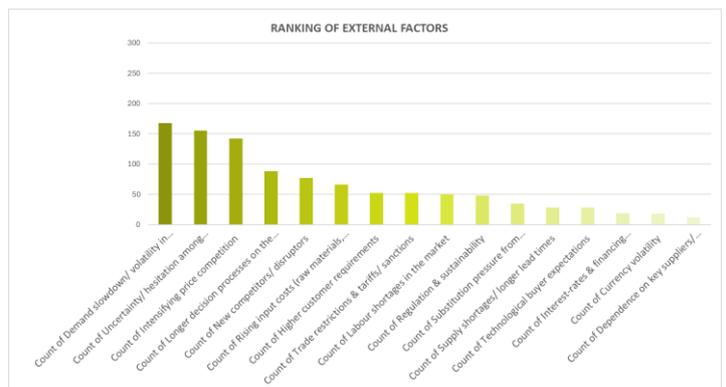
👉 Leaders here are taking a conservative stance – tightening sails instead of chasing open waters.

EXTERNAL PRESSURE VS. INTERNAL POSTURE

Reading the Wind Before Setting the Sail

Sales leaders in Europe are facing a landscape marked by high uncertainty and rising pressure – but not all disruptions weigh equally. As the chart below illustrates, some external factors dominate the minds of commercial decision-makers, while others register more quietly in the background.

The point isn't predicting the weather — it's deciding **where to reinforce** and **where to accelerate**.



The Front-Runners:

- The **top three pressures** – *demand volatility in target industries, price competition, and customer hesitation* – were each selected by over half of all respondents. These are the commercial crosswinds felt most acutely across sectors.



- Factors such as *longer decision cycles*, *regulatory complexity*, and *new competitors* also ranked prominently, highlighting friction both on the **buying side** and **within the market structure** itself.

At the lower end of the scale, topics like *currency volatility*, *trade barriers*, and *labour shortages* were selected by fewer than 1 in 5 respondents. Whether seen as **background noise**, already **priced into the strategy**, or **sector-specific issues**, they currently play a smaller role in shaping overall sentiment.

Grouping the Storms: A Strategic View

To make sense of the broader forces at play, we clustered the 16 external factors into four strategic pressure categories:



Economic:

demand volatility, input costs, supply bottlenecks, financing risk, labour shortages



Political:

regulation, trade restrictions, policy-driven uncertainty



Customer:

longer buying cycles, higher expectations, digital procurement demands



Competition:

price pressure, disruptors, substitution risk

This categorization makes it easier to step back from the noise of individual symptoms and see which structural pressures shape sales outlooks.

Interestingly, **Economic pressures were selected by a clear majority**, driven by inflationary costs, interest rates, and raw material scarcity. Political and Competitive factors were named less often – though still prominent – while **Customer pressures showed the most variance**, ranging from widely cited buying hesitancy to niche concerns like eProcurement readiness.

Across the board, the **number of pressures selected had no strong effect** on whether sales leaders were optimistic or pessimistic – a reminder that it's not the storm itself, but how you read the wind, that determines your heading.

Too Many Fires To Steer Freely: What Pressure Reveals About Outlook

Sales leaders don't just list external pressures – they weigh them. And the more intense those pressures feel, the more they drag down sentiment and optimism.

When we grouped the 16 external factors based on how often they were selected, we saw a clear pattern:

The **more "pressing" factors** a respondent selected, the lower their reported **Outlook** ($r = -0.28$) and **Sentiment** ($r = -0.31$). Leaders who perceive themselves surrounded by immediate threats are clearly less hopeful – a signal of the emotional load tied to proximity of impact.

Urgency Category	Factors Included	Total Selections
● Pressing	Demand volatility, price competition, customer hesitation, longer decision cycles	553
● Important	Regulatory pressure, new competitors, ESG complexity, rising input costs	247
● Relevant	Financing/investment barriers, customer tech expectations, supply chain fragility, substitution pressure	161
● Niche	Labour shortages, trade restrictions, FX risk, supplier dependence	77

The more "pressing" factors a respondent selected, the lower their reported Outlook ($r = -0.28$) and Sentiment ($r = -0.31$). Leaders who perceive themselves surrounded by immediate threats are clearly less hopeful – a signal of the emotional load tied to proximity of impact.

But **what type of pressures** matter most?

To go further, we regrouped the external factors into four conceptual categories – **Economic, Political, Customer, and Competition** – and measured how each relates to Outlook and Sentiment.



Economic pressures (e.g., demand drops, rising costs, interest rates) had the strongest negative correlation with Outlook ($r = -0.24$), and were also discouraging for sentiment.



Customer challenges (e.g., long decision cycles, digital expectations) had a small positive correlation with optimism – these seem manageable or familiar.



Political pressures (regulation, sanctions, decision-making hesitation) affected Sentiment more than Outlook.



Competitive dynamics, while negative, showed only mild impact – possibly seen as “part of the game.”

To sharpen the analysis, we focused only on high-urgency factors (those rated as Pressing or Important). The pattern became even more pronounced:

Category	Sentiment	Outlook
Economic	-0.20	-0.32
Political	-0.23	-0.26
Customer	+0.02	+0.14
Competition	-0.15	-0.08

It's not just what's happening – it's **how much it hits sales directly** that shapes mindset.

Leaders feel worst when external forces **block revenue flow, raise cost barriers, or freeze customers in place**. The more those barriers pile up, the less room there is for positive outlook – no matter how good the past year may have been.

INDUSTRY OUTLOOK AT A GLANCE

“No storm hits all ships the same – but some see clearer skies.”

Across industries, the 2026 sales sentiment reflects a mix of resilience, uncertainty, and structural pressure. The **Pharmaceuticals and Healthcare sector** is the clear outlier with **above-average sentiment and the strongest outlook**, reflecting market stability and post-pandemic confidence – even as price pressure and new competition loom.

At the opposite end, **Automotive and Retail** show the **lowest sentiment and weakest outlooks**, driven by economic volatility, cost burdens, and aggressive competition. Their pressure profiles are shaped by cyclical demand and squeezed margins – a reality already embedded in their sales leadership's expectations.

The **Machinery & Electrical** sector sets the baseline, mirroring the European average almost exactly, while **Construction, IT, and Services** form a middle tier. These sectors report moderate pressure and mixed emotional signals – not overtly pessimistic but marked by caution.



Industry-specific challenges clearly shape perception: where **competitive and customerside friction dominate**, sentiment tends to dip. Where **structural stability or public-sector exposure** offers a buffer, the mood improves. What unites them all is the sense that **navigation in 2026 requires vigilance – and a tight grip on the wheel**.

Machinery, Plant Engineering & Electrical Industry

“Stable course under pressure – but exposed to sudden turns.”

The **Machinery, Plant Engineering & Electrical Industry** serves as a benchmark for the survey, showing a balanced but cautious view of market conditions. Sales leaders in this sector report an average of **4.07 external factors** affecting their sales – slightly below the European average. Their **sentiment (5.56)** and **outlook (5.43)** align closely with the overall mood, suggesting a grounded but not overly pessimistic stance.



The top concerns are **uncertainty among stakeholders, demand volatility, and intensifying price competition** – a triad that reflects exposure to both macroeconomic turbulence and shifting buyer behaviour in downstream industries.

Conceptually, the dominant source of pressure is **economic** (1.31 selections per respondent), followed by **political** (1.10), **customer-related** (0.84), and **competitive** (0.82). This mix indicates a **broad spectrum of external challenges**, rather than a single dominant crisis.

The relatively stable sentiment may reflect the industry's structured planning cycles and a degree of operational resilience. Still, the data suggests a latent fragility: outlook could quickly decline if customer hesitation persists or demand volatility intensifies.

Services

“Weathering the fog – confident, but not blind.”

Sales leaders in the **Services sector** report the **fewest external pressures** in this year's study, selecting just **3.46 external factors** on average – well below the European benchmark. Despite this, their **sentiment (5.77)** is relatively optimistic, while their **outlook (5.19)** is slightly more cautious, hinting at a gap between current confidence and future expectations.

The most commonly cited pressures are **stakeholder hesitation** (31), **demand volatility** (30), and **longer decision processes** (21). These are primarily customer-facing challenges, typical for a sector that depends on **access, influence, and trust** in buyer relationships.

Conceptual analysis shows a balanced distribution: **economic factors** (0.98) are slightly more prominent, followed closely by **competitive** (0.92), **political** (0.81), and **customer-related** (0.75) concerns. The relatively even spread may indicate that no single disruptive force dominates – but **minor friction across all fronts** adds up.

Despite lower pressure levels, the softening of outlook suggests that service providers **sense turbulence on the horizon**.

Their optimism may stem from commercial agility and human capital – but prolonged buyer indecision could shift sentiment quickly if left unaddressed.

Wholesale & Retail

“Heavy traffic ahead – pressure from all sides.”

The **Wholesale & Retail sector** reports the **highest average number of external factors** (4.3), suggesting a broad exposure to external disruptions. At the same time, it registers the **lowest sentiment score (4.90)** among major sectors, with a **moderate outlook (5.07)** – highlighting a market that feels strained and only cautiously optimistic about the near future.

Top concerns include **demand volatility** (22), **stakeholder hesitation** (20), and **intensifying price competition** (20). This combination reflects the industry’s vulnerability to **shifting buyer behavior, supply chain friction, and aggressive pricing environments** – all of which directly compress margins and planning reliability.

Conceptually, external pressure is spread across all fronts: **economic factors** (1.27) lead narrowly, followed by **competitive** (1.07), **political** (1.00), and **customer-side** challenges (0.97). This even distribution underlines that retailers and wholesalers don’t just face a single threat – they navigate a dense web of external forces.

The subdued sentiment points to accumulated strain after years of logistical instability, inflation-driven price sensitivity, and regulatory changes.

While outlook hasn’t collapsed, many in the sector seem to be **bracing for impact rather than charting aggressive growth**.

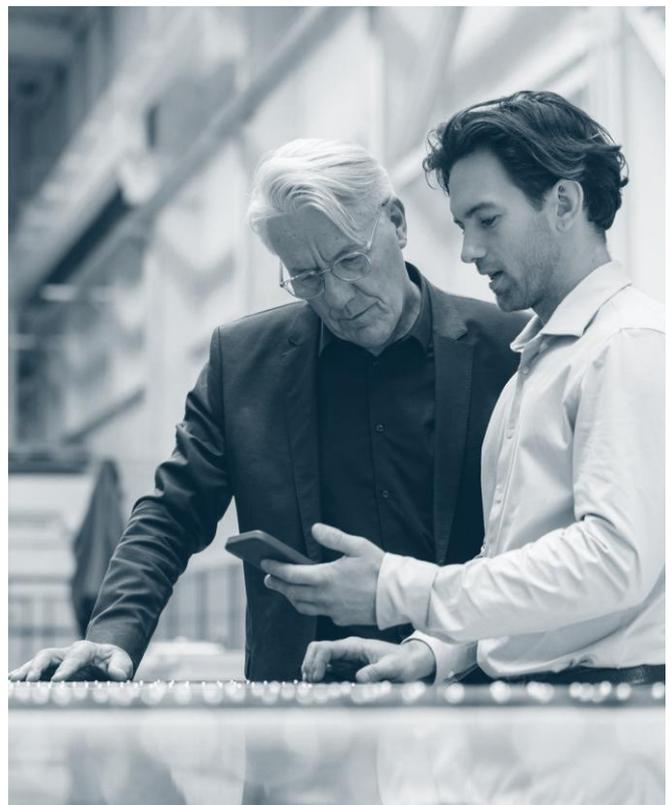
Construction & Trades

“Under pressure but not sinking – yet.”

Sales leaders in the **Construction & Trades** sector report relatively **low external pressure** with an average of **3.42 factors** selected – well below the European average. Sentiment (5.26) is subdued, while **outlook (5.42)** is slightly more optimistic, suggesting a wait-and-see approach rather than visible confidence.

The most commonly selected pressures are **stakeholder hesitation** (12), **demand volatility** (11), and **price competition** (9) – a familiar trio that reflects both investment uncertainty and margin stress. These challenges are particularly acute in construction, where projects are often capital-intensive and highly sensitive to financing conditions.

Conceptually, pressure is **heavily weighted toward economic factors (1.53)**, followed by **political (0.84)**. Customer-side and competitive concerns (both at 0.53) are notably less dominant. This shows that the sector feels more exposed to **macro conditions and regulatory environments** than to buyer behavior per se.



The picture that emerges is one of latent fragility: construction players are moving cautiously amid interest rate burdens, ESG shifts, and reduced investment visibility. The **slightly above-average outlook** might reflect pipeline optimism – but cracks could widen quickly if macroeconomic winds shift again.



Information Technology & Telecommunications

“Calm on deck – but pressure is building below the surface.”

The **IT & Telecommunications** sector presents a mixed picture. It reports a **moderate number of external pressures** (3.59 on average), and a **slightly above-average sentiment** (5.47). However, its **outlook (4.82)** is among the lowest across all industries – a sign that confidence in future sales performance may be eroding despite current stability.

Top concerns include **stakeholder uncertainty** (13), **demand volatility** (8), and **longer decision cycles** (5).

These are all buyer-side dynamics, suggesting that providers in this space are not worried about their own capacity or competitive positioning, but rather about their customers’ ability to commit.

Conceptually, the main source of external pressure is **political (1.12)** – likely reflecting regulation, data policy, and digital sovereignty issues – followed by **economic (0.94)** and **customer-side friction (0.88)**. Competitive pressure (0.65) is seen as less of a concern, possibly due to strong positioning or differentiated offerings in niche markets.

The subdued outlook might stem from growing complexity in public sector and enterprise sales, long procurement cycles, and pressure to prove ROI. Despite agile product portfolios, many IT providers appear to be **waiting for decision-makers to move again – or risk drifting into headwinds.**

Pharmaceuticals, Healthcare & Medical Technology

“High pressure, high morale – sailing ahead with confidence.”

Despite facing a notable set of external challenges, the **pharma and medical technology** sector stands out for its optimism. With an **above-average sentiment score (6.15)** and the **highest outlook of all major industries (6.46)**, sales leaders in this field appear to be navigating uncertainty with surprising confidence. They report **3.69 external factors** on average – below the survey median – indicating that the sector doesn’t feel broadly threatened but is focused on a few significant risks.

The most cited concerns are **intensifying price competition** (8), **new competitors/disruptors** (6), and **demand volatility** (5). These pressures reflect **market dynamics** rather than macro shocks – particularly reimbursement trends, emerging digital health players, and access to procurement channels.

Conceptual categorization reveals **competitive pressure** (1.15) as the most prominent driver – higher than in any other sector – followed by **customer-side factors** (0.92). Economic and political concerns play a lesser role, reinforcing that the industry's focus is on **market share and relevance**, not macroeconomics.

The strong outlook may be underpinned by high entry barriers, innovation cycles, and robust public demand. Still, the signals are clear: **commercial models in life sciences are evolving fast**, and while confidence is high, the pressure to stay ahead of disruption is mounting.

Automotive & Supplier Industry

“The pressure is back – with no easy lane ahead.”

The **Automotive & Supplier Industry** reports some of the **lowest sentiment** (4.62) and **outlook** (4.38) scores across all sectors – suggesting a climate of caution, if not outright concern. Despite this, the number of external factors selected (3.46) remains below average, hinting at either pressure saturation or prioritization of a few high-impact concerns. The leading challenges are **demand volatility** (10), **intensifying price competition** (7), and **stakeholder hesitation** (5). These align with the industry's exposure to cyclical markets, disruptive transformation (e-mobility, software-defined vehicles), and fragile global supply chains.



From a conceptual view, **economic pressures** (1.23) and **competitive intensity** (1.08) dominate, with customer-side and political concerns trailing well behind.

This profile reflects a **squeeze from both ends**: unpredictable demand meets increasingly aggressive pricing and margin erosion.

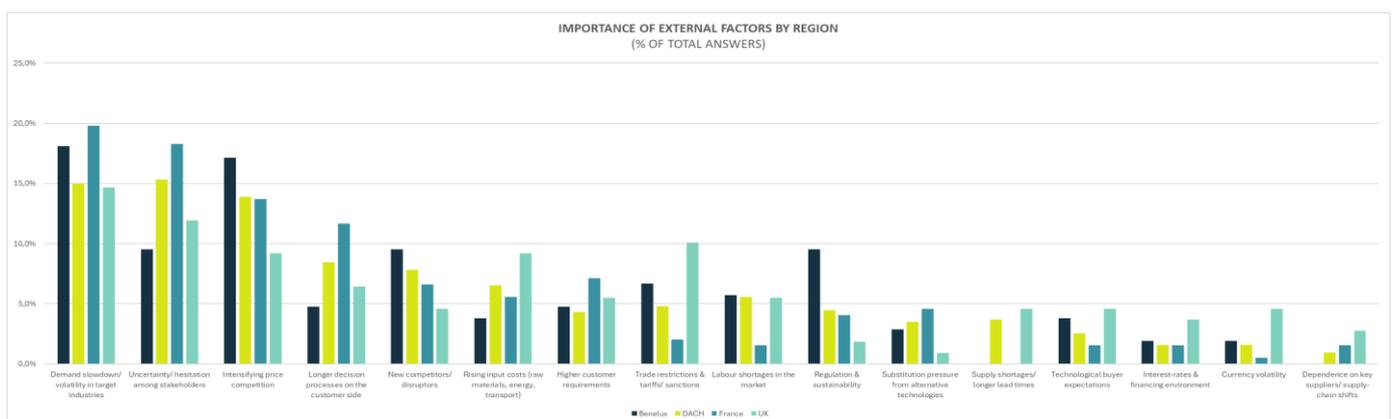
This sector appears stuck between structural transformation and external instability. Sentiment and outlook suggest that many are **bracing for a tough road ahead**, focused on cost containment and resilience rather than confident expansion.



REGIONAL REALITIES: READING THE BAROMETER WHERE YOU STAND

“Pressure, perception, and preparation – where sales leaders diverge.”

While the overall sentiment and outlook of European sales leaders has already painted a mixed picture, a closer look reveals that **regional dynamics tell very different stories**. Sales leaders in the UK, France, Benelux, and DACH are **not facing the same weather** – nor are they interpreting the clouds in the same way.



This chapter turns the spotlight onto **external pressures** and how they are perceived across regions. We examine how **many** and **what kind of external factors** are shaping expectations, and how these pressures align – or clash – with the mood on deck. Some regions report **high pressure but steady hands**, others show signs of **crisis fatigue or underlying pessimism** despite lighter loads.

By comparing the **type and intensity of external stress**, we begin to understand how sales leaders in each market **rationalize their optimism or anxiety** – and how prepared they feel heading into 2026. After all, **it's not just about the storm – it's about the crew's ability to steer through it.**

Benelux – Clear Priorities in a Low-Pressure Market

Benelux sales leaders selected **fewer external factors overall**, but the pattern of responses still offers insight into their **commercial concerns heading into 2026**. With relatively less focus on macro or customer-side issues, the **core concerns lie in operational and market-driven dynamics**.

Breakdown of external pressure by category (share of all mentions):

-  **Economic:** 31.4%
-  **Competition:** 29.5%
-  **Customer:** 22.9%
-  **Political:** 16.2%



What stands out are two **notable outliers**:

1. **Price pressure from competitors** was mentioned in **17.1%** of all Benelux responses – a clear pain point even in this otherwise calm market.
2. **Regulatory and sustainability requirements**, while part of a lower-ranked category, accounted for **9.5%** of all mentions – higher than one might expect, and potentially growing in influence.

These results underline a **pragmatic outlook**: Benelux sales leaders are less swayed by noise and more focused on **competitive positioning and profitability**, even as regulatory undercurrents quietly rise.

DACH – Juggling Buyer Behaviour and Market Pressure

Sales leaders in the DACH region face a **broad spread of external pressures**, with little variation across the main categories – suggesting a market that feels **pulled in multiple directions**.

Distribution of external factor mentions in DACH (% of all mentions):

-  **Customer:** 30.6%
-  **Economic:** 30.3%
-  **Competition:** 29.8%
-  **Political:** 9.3%



Two factors stand out:

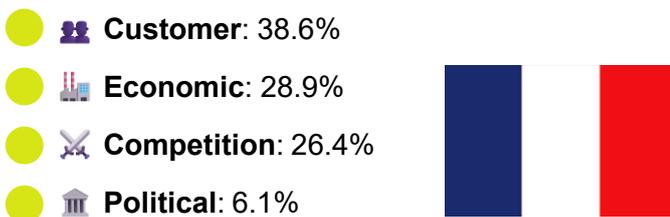
1. **Price pressure from competitors** made up **13.9%** of all responses – a sign that even in premium markets, price wars remain intense.
2. **Regulatory and sustainability requirements**, in contrast, accounted for only **4.5%** – relatively low and perhaps reflecting better preparation or adaptation to ESG frameworks.

This near-even distribution shows that **DACH companies aren't dominated by one single pressure**, but must instead navigate a **highly complex landscape**, particularly with **demand volatility and hesitant buyers**.

France – Customer Complexity Is King

In France, sales leaders are primarily concerned with **what happens at the customer interface**. No other region shows such a strong dominance of **customer-related external pressures** – a reflection of longer sales cycles, complex stakeholder environments, and rising service expectations.

Distribution of external factor mentions in France (% of all mentions):



Even though **price pressure** still ranks high – making up **13.7%** of all mentions – the data suggests that **the sales battle in France is not just about margins**, but about navigating increasingly demanding and risk-averse buyers.

Meanwhile, **regulation and sustainability** remain secondary, accounting for only **4.1%** – again suggesting either regulatory stability or low perceived urgency.

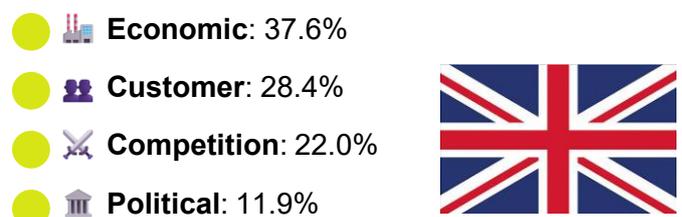
This paints a picture of a sales environment where success depends not on cutting costs, but on **orchestrating complex buying centers and delivering confidence**.

UK – Macro Fears Over Micro Frictions

In contrast to France and Benelux, **UK sales leaders are most concerned with macroeconomic and political instability**. The UK ranks highest in mentions of **economic (37.6%) and political (11.9%) pressures**, suggesting a business environment still grappling with **structural volatility** – from **inflation and financing costs to trade disruptions and currency swings**.



Distribution of external factor mentions in the UK (% of all mentions):



While **Brexit may have faded from headlines**, its effects clearly persist. Ongoing concerns about **trade restrictions** and **exchange rate risks** remain **more visible in the UK** than in any other region surveyed – highlighting that **geopolitics still shapes go-to-market strategies**.

Interestingly, **price pressure** from competitors is relatively less pronounced here (**9.2%**), and **regulatory or ESG factors** barely register (**1.8%** – the lowest share in Europe).

In sum, the UK's sales climate is less about fine-tuning customer journeys and more about **navigating macro headwinds**. Sales leaders in the UK are **steering through external storms**, where **budgets, policies, and FX rates** carry more weight than buyer expectations.

HIGHLIGHT BOXES

1 Pressure Comes in Different Shapes

While DACH faces a broad mix of external factors, France is dominated by customer-side complexity, and the UK is caught in macroeconomic and political turbulence.

No single European playbook fits all. Sales leaders must calibrate their response to local realities – from hesitant buyers in France to inflation fears in the UK.

2 Price Pressure – Still the Common Denominator

Despite different macro contexts, “**price pressure from direct competitors**” remains **one of the most frequently selected factors** across regions – peaking in Benelux (17.1%) and DACH (13.9%).

Sales organisations must **defend value** proactively to avoid commoditisation in a market still marked by saturation and budget constraints.

3 Regulatory Fatigue or Maturity?

ESG and regulatory issues rank **surprisingly low** in most regions – just **4.5% in DACH**, **4.1% in France**, and only **1.8% in the UK**.

Are sales leaders underestimating the sales-side impact of sustainability? Or does this reflect **successful adaptation** – especially in heavily regulated industries?

STRATEGIC INITIATIVES – SETTING SAIL OR DRIFTING?

A look behind the buzzwords: where strategy meets pressure.

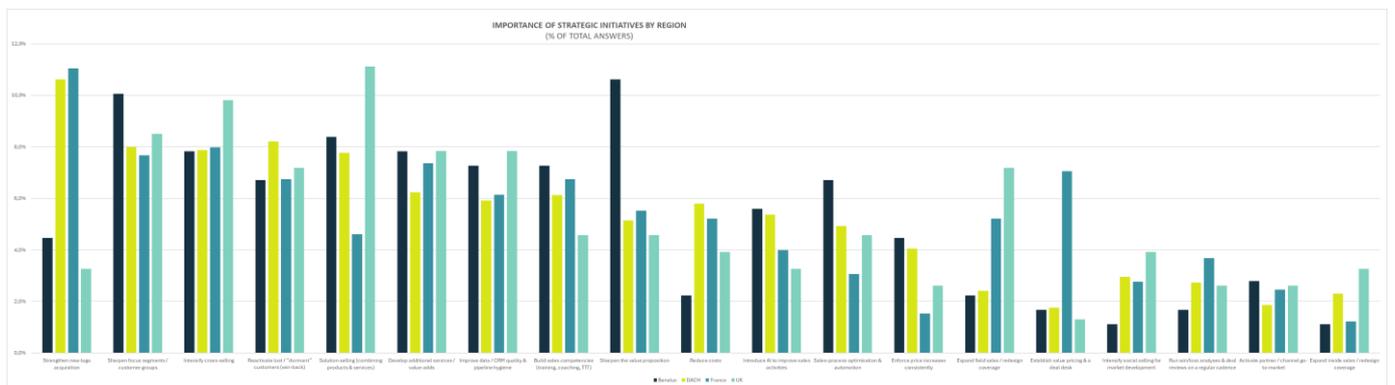
As shown in the previous chapters, **sales sentiment in 2026 is driven more by perception than performance**. Confidence is high even where targets were missed – but the real question is: **what actually gets done?**

This chapter moves beyond mindset into **movement**. It explores how sales organizations are translating pressure, performance gaps, and shifting markets into **strategic action**. Are they adapting, transforming, defending – or simply doing more of the same?

To answer that, we break from the structure of earlier chapters. Instead of isolating findings and then dissecting them by region or industry, we integrate these perspectives directly into the analysis. After all, **strategy doesn't unfold in isolation** – it's shaped by industry logic, regional market maturity, and commercial realities on the ground.

We start by looking at how active companies really are – how many initiatives they pursue, and where. Then we explore which initiatives are most popular, how they cluster into strategic directions, and how different regions and industries prioritize. Finally, we ask what actually works: are certain strategies linked to higher outlook, sentiment, or performance?

Because in 2026, companies need more than plans — they need targeted activities.



STRATEGY IN MOTION: HOW ACTIVE ARE SALES ORGANISATIONS?

Before diving into *what* sales leaders focus on, we first examine *how much* strategic activity is actually taking place. The question: Are European sales organisations acting decisively – or hesitating under pressure?

A Busy Field – But Is It Focused?

Across the board, companies report a high level of strategic activity: on average, each respondent selected **7.5 out of 19** possible initiatives. That's over 40% of all options available – suggesting that many are running **parallel tracks of action** rather than concentrating efforts.

But there's wide variation hidden behind that average.

Regional Differences: UK Leads, Benelux Holds Back

Looking at average initiative count per region:

- **United Kingdom: 8.2 initiatives per respondent** (46% of all options)
- **France: 7.6**
- **DACH: 7.2**
- **Benelux: 6.5**



The **UK** clearly stands out. Sales leaders there are pursuing nearly every second initiative on the list – possibly reflecting a high-pressure environment marked by macroeconomic uncertainty,

Brexit aftermath, and rapid digitalisation.

Benelux, on the other hand, is more reserved. Whether this indicates **strategic focus** or **organizational inertia** is up for interpretation – but the gap is noticeable.

Industry Activity: Tech & Services Push Forward

Some industries are clearly more engaged than others:

- **Software / IT: 8.8 initiatives per company** (49%)

- **Telecommunications: 8.3**

- **Professional Services: 8.2**

These sectors show the **highest strategic engagement**, driven likely by digital disruption, shorter product cycles, and competitive pressure.

At the other end:

- **Construction / Engineering: 6.4** (36%)

- **Chemicals / Pharma: 6.7**

- **Machinery / Equipment: 6.9**

These more traditional sectors appear to be pursuing **fewer, more targeted initiatives** – possibly due to longer investment cycles or internal complexity. Whether this restraint reflects strategic clarity or hesitation remains an open question.

Performance Doesn't Equal Proactivity

Interestingly, **high performers** (companies reaching $\geq 110\%$ of target) reported fewer initiatives on average (**7.0**) than underperformers. There's also **no meaningful correlation** between the number of initiatives and **sentiment** or **outlook**.

The conclusion? Companies don't act more just because they feel confident – and those under pressure aren't necessarily more proactive either.

STRATEGIC PRIORITIES – WHAT SALES LEADERS ARE FOCUSING ON

Strategic initiatives reveal what companies are actually doing to steer through 2026 – beyond sentiment or performance. The chart below shows how frequently each initiative is mentioned across the regions. We highlight not just the top performers, but also **what unites**, **what diverges**, and **what's surprisingly missing**.

Common Ground: Familiar Tools Stay Relevant

Across all markets, a handful of priorities form a **pan-European strategic core**:

Sharpening customer focus (segments, value proposition) remains a top initiative in **every region** – with Benelux placing over **10%** of its answers on each.

Cross-selling and solution selling are consistently strong – with the **UK** and **France** favouring more bundled, consultative approaches.

CRM improvements and value-added services maintain mid-table strength across the board, suggesting organisations are pushing for better enablement without major transformation.

These are tried-and-tested moves – not radical shifts, but consistent effort to align with customer needs and improve internal systems.



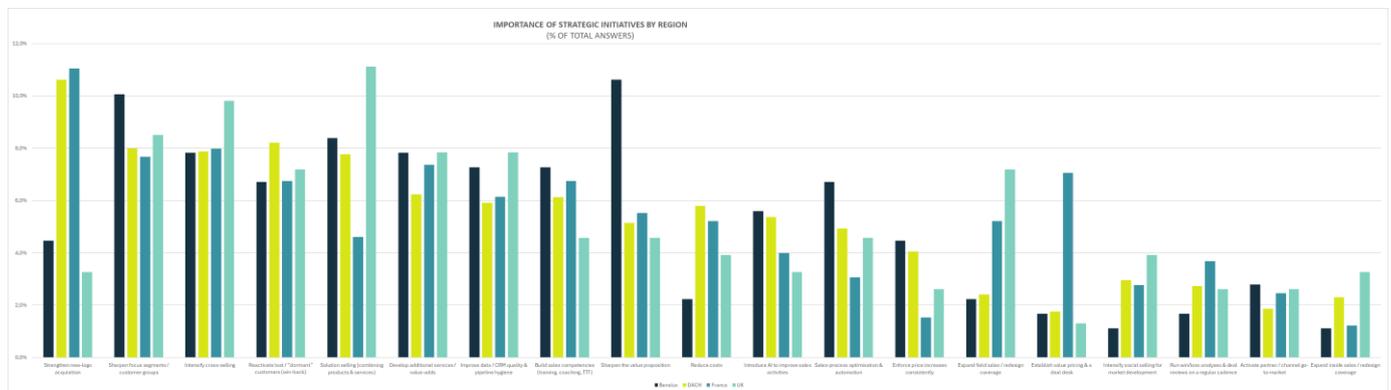
Regional Contrasts: Different Markets, different Plays

While a baseline of shared priorities exists, there are **clear regional signatures**:

- **France and DACH** double down on **new-logo acquisition**, making it their top pick – over **10%** of all selections in each.
- The **UK** leans heavily into **solution selling** and **coverage redesign**, hinting at a need to reconfigure go-to-market approaches amid changing customer structures.

- **Benelux** takes a different path – focusing on **sharpening segmentation** and **value messaging** rather than expansion.

These patterns likely reflect **market maturity and structural challenges**. The UK's focus on reorganisation may echo Brexit-related disruptions. France and Germany's emphasis on acquisition points to pressure for growth. Benelux's strategic refinement suggests consolidation over expansion.



Blind Spots or Baked In?

A striking finding is what's **underrepresented** – but not all absences are equal.

Some lower-ranked initiatives, such as **AI usage**, **sales competency building**, or **CRM improvements**, may no longer be “front-of-mind” because they've already been embedded in operations. In many companies, they've **matured from project to process**.

However, other topics feel more like **missed opportunities**:

- **Pricing excellence** – in terms of both **value pricing** and **consistent enforcement** – remains underutilised despite its proven margin impact.

- **Partner channels** and **win/loss reviews** are also neglected, even though they can unlock reach and learning with limited investment.
- Even **cost reduction** and **sales coverage redesign** – classic levers in volatile times – rank low on most agendas.

In short: some quiet spots may reflect maturity – others, strategic inertia. The challenge for sales leadership is to know which is which.

STRATEGIC CLUSTERS – PATTERNS BEHIND THE ACTION

Why Group? Making Sense of Activity

When asked which strategic initiatives they plan to pursue in 2026, sales leaders across Europe had no shortage of ideas. From sharpening customer segments to implementing AI, the survey offered 19 different options – and most respondents selected several. But with so many actions on the table, a clear picture becomes hard to form.

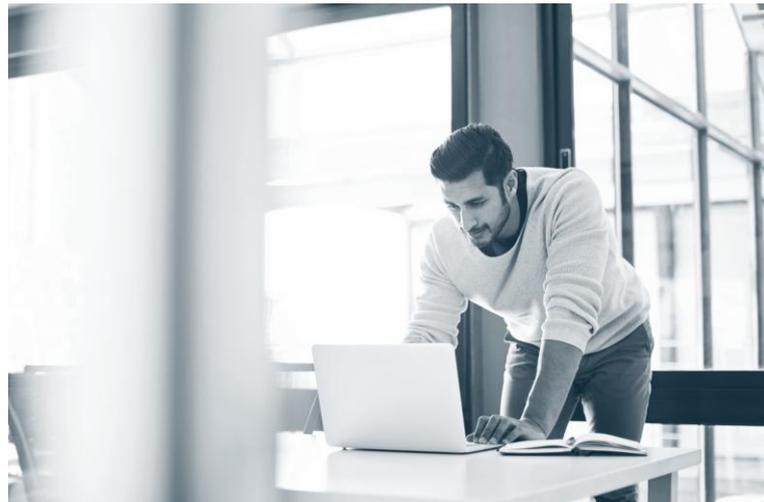
That's where **clustering** comes in. To move from activity to **insight**, we introduce two types of groupings:

1. Conceptual Clustering – What Kind of Strategy Are We Seeing?

Based on strategic intent, the 19 initiatives have been grouped into four overarching clusters:

This **conceptual grouping** allows us to look beyond isolated tactics and ask:

What kind of sales strategy is emerging across industries and regions?



Strategic Cluster	Theme	Sample Initiatives
Customer Focus & Growth	Growing accounts, segments, and reach	Cross-/upselling, reactivation, segmentation, new logo acquisition
Value Orientation	Sharpening what is sold and why	Solution selling, value proposition, pricing, deal desk
Sales Enablement	Improving the people, tools, and processes	CRM hygiene, training/coaching, process optimisation, AI tools
Strategic Control	Driving profit through steering mechanisms	Cost reduction, channel design, win/loss reviews, partner strategy

2. Priority Clustering – What Really Matters?

Not every initiative was chosen equally. To understand which levers are seen as **urgent**, we also categorised the initiatives based on their **selection frequency across all respondents**: This gives us a map not just of *what* companies are doing – but **how committed they are**.

With these two lenses in place, we can now turn to the data and ask:

- Which clusters dominate?
- Where do industries diverge in their strategic posture?
- And are companies focusing on the right things – or just staying busy?

Let's explore.

Priority Tier	Description	Implication	Sample Initiatives
High Priority	Chosen by a large share of respondents	Core actions for many – clear signals of urgency	Intensify cross-selling; Reactivate lost customers; Sharpen focus segments; Solution selling; Strengthen new-logo acquisition
Relevant	Mid-level frequency	Broad interest, but not dominant	Build sales competencies; Develop additional services; Improve data/ CRM quality & pipeline hygiene; Reduce costs; Sharpen the value proposition
Secondary	Lower frequency	Niche or situational strategies	Enforce price increases consistently; Establish value pricing; Expand field sales; Introduce AI to improve sales activities; Sales-process optimisation & automation
Rare	Very infrequent	Ignored, deprioritised, or already implemented	Activate partner/ channel go-to-market; Expand inside sales; Intensify social selling; Run win/loss analyses & deal reviews

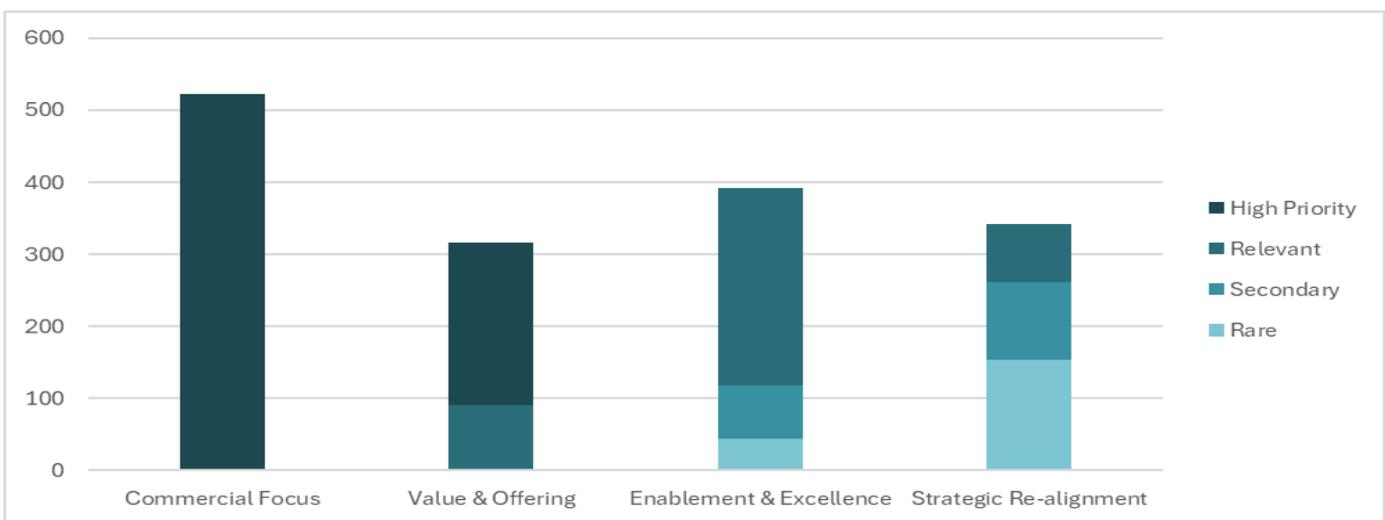
Making Sense of the Data: What the Clusters Reveal

Sales leaders across Europe are not sitting still. The data paints a picture of 2026 as a **year of action**, focused on pragmatic growth and execution over strategic reinvention. With over **1,500 individual initiative selections**, the strategic direction is clear: companies are targeting **quick wins** – and they're doing so with consistency across industries and regions.

1. Commercial Focus Leads the Pack

The top 4 initiatives by volume – *new-logo acquisition, focus segmentation, cross-selling, and win-back campaigns* – all belong to the **Commercial Focus** cluster. Together, they represent over **34% of all initiative selections**, pointing to a strong, shared commitment to **customer-side growth**.

This isn't just noise. It's a signal: **sales organisations are steering toward market-facing activities** with immediate commercial payoff. After years of reacting to uncertainty, leaders appear to be **back on the offensive** – prioritising tangible revenue opportunities over abstract transformation.



The strategic priority data reveals one overarching message:

2026 is about doing, not dreaming. Sales leaders are focusing on **commercial traction, fast activation, and building momentum**. Transformation hasn't disappeared – but it has taken a back seat to execution.

The clusters help uncover this: what at first appears to be a laundry list of initiatives actually reveals a structured, **tactically coherent** playbook for growth in turbulent times.

2. Value & Offering: High Strategic Relevance, Lower Activity

The **Value & Offering** cluster (e.g., *solution selling, value-adds, value proposition*) receives fewer absolute selections due to fewer initiatives in the category but holds up strongly when adjusted for cluster size. All three initiatives here are marked **High Priority** or **Relevant**, suggesting that **those who invest in differentiation** do so with clear intent.

Still, the lower volume may reflect either **prior completion** of foundational work in this area or hesitation to overhaul core propositions while markets remain volatile.

3. *Enablement & Excellence: Solid but Not Urgent*

Initiatives tied to **sales process, competency building, and tooling** (e.g., *CRM hygiene, training, AI integration*) occupy the **Enablement & Excellence** cluster. They make up roughly **25% of total selections**, but most fall into the *Relevant* or *Secondary* priority levels. This implies that while **capability development remains on the radar**, it is not seen as the most urgent lever in the current market.

Interestingly, no Enablement initiative breaks into the top five – underlining the shift from internal optimisation to external activation.

4. *Strategic Re-alignment: Broad, but Often Overlooked*

The most diverse cluster, **Strategic Re-alignment**, includes pricing, coverage models, and cost control. Yet five of its seven initiatives rank **Secondary or Rare** in terms of priority. Despite their potential strategic impact, many of these themes – such as *partner/channel go-to-market* or *deal desk pricing* – seem to be **"nice-to-have" rather than "must-do"** in 2026.

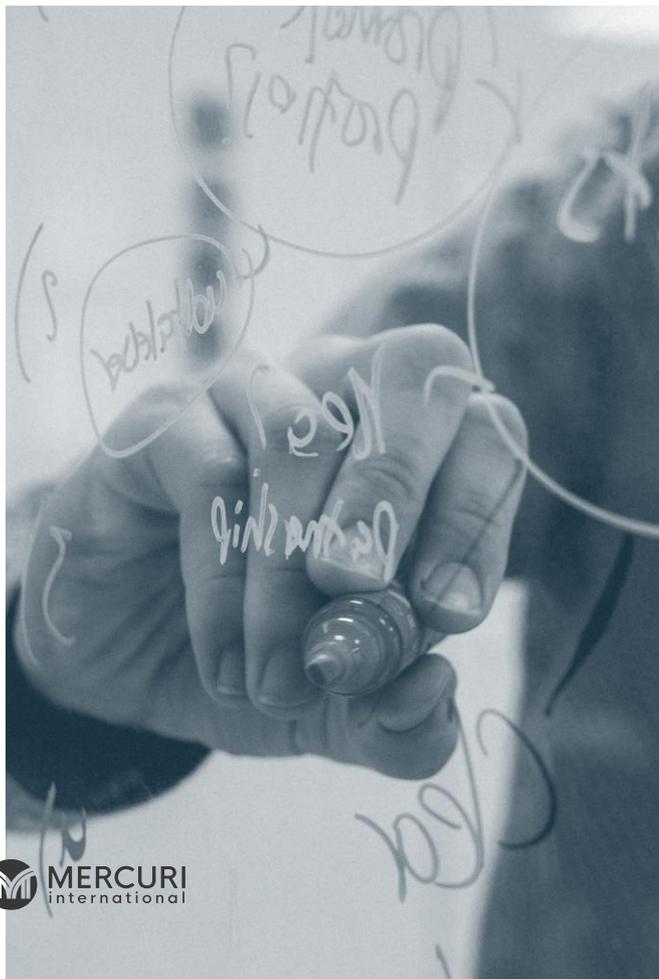
This could signal **organizational fatigue with deep transformation**, or a conscious shift to what feels controllable and close to revenue.

Reading the Currents – Strategic Patterns Below the Surface

In the sea of strategic initiatives, the clustering approach helps make sense of activity patterns. By sorting each initiative into one of four conceptual directions – *Commercial Focus, Value & Offering, Enablement & Excellence, and Strategic Re-alignment* – and assigning urgency based on selection frequency, a clearer picture emerges.

The data reveals that **sales organisations in 2026 are leaning toward pragmatic, revenue-oriented action**. The strongest current lies in the **Commercial Focus** cluster: new logos, segment focus, and cross- or upselling dominate across industries and regions. These aren't theoretical – they're moves designed to deliver numbers now.

In contrast, **longer-term enablers** such as pricing models, sales coverage redesign, and partner channels are **underrepresented** – not absent but often postponed. They belong to the *Strategic Re-alignment* cluster, which, while complex and impactful, struggles to gain prioritisation in a high-urgency year.



Meanwhile, the *Enablement & Excellence* cluster – CRM, training, AI, process work – is widely selected but rarely tops the list. It supports momentum but doesn't drive it.

This shows a clear pattern: **2026 is about activation over aspiration**. Strategy is no longer a buzzword – it's judged by its ability to move the needle.

But as we'll explore next, **realising impact depends on how leadership turns these initiatives into focused execution**.

2026: THE YEAR OF ACTION – IMPLICATIONS FOR SALES LEADERSHIP

“Strategy doesn't live in slides – it lives in decisions, investments, and team priorities.”

The data tells a clear story: **2026 won't be defined by new visions, but by visible decisions**. Sales leaders across Europe are not short on strategic ideas – they are launching initiatives at pace, leaning into commercial priorities, and focusing on pragmatic execution. Sentiment is high, even when achievement lags. This is not naivety – it reflects a collective push to make progress, quickly and tangibly.

Strategic activity is widespread, but what matters now is **strategic leadership**: turning this energy into coordinated, high-impact movement. Below, we unpack what the findings mean for sales leadership in 2026.

Recalibrating Strategic Leadership: Less Vision, More Velocity

How sales leaders move from ambition to action.

In 2026, sales teams aren't short on initiatives. From reactivating dormant customers to sharpening value propositions and rolling out AI tools, the average company is pursuing more than six initiatives in parallel. But real leadership starts *after* the ideas are picked.



The **clustering of initiatives by priority and concept** helps leaders make sense of this landscape. While high-priority actions around customer focus and value creation dominate the charts, low-priority “nice-to-have” initiatives still consume attention. **The danger isn't inaction – it's distraction.**



From Enablement to Enablement-Led Growth

Skills, tools, and systems as strategic growth engines – not support functions.

Enablement is everywhere – and rightly so. In 2026, **nearly every sales organisation surveyed is investing in enablement initiatives**, from CRM hygiene to coaching, from AI experimentation to process optimisation. It's not a side topic – it's a top priority. But the data tells a deeper story: **enablement is no longer just an enabler**. It must become a **driver of growth**.

In past years, initiatives like training or process updates were often treated as background programs – support infrastructure for whatever the business was “really” doing. Now, **they have to support the strategy**: the key to making strategic shifts actually stick.

That's especially visible in the high priority clusters. Commercial focus initiatives like new-logo acquisition or segment focus **only work if the sales engine behind them is tuned and ready**. It's not enough to set the direction – teams must be **equipped and empowered** to execute.

So, what does that mean for sales leadership?

Embed enablement in every initiative – treat it as part of the go-to-market strategy, not an afterthought.

Measure it by business outcomes, not just activity: better pipeline, shorter cycles, improved win rates.

Modernise the approach – training is not a PowerPoint. It's coaching, digital content, AI-driven nudges, and field-validated tools.

Connect the dots for teams: show how systems and skills directly serve growth, not just compliance.

What sales leadership must now do is **create clarity**. Clarity about:

- *What matters most in this market.*
- *Which capabilities need to scale fast.*
- *Where momentum is already building – and should be fuelled.*

The challenge isn't to launch more. It's to **turn plans into practice** – fast, visibly, and repeatedly. Because in uncertain seas, leadership is no longer about direction alone – it's about **helping the crew move in sync**.

To make action stick, sales leaders must:

- Translate high-level goals into tangible team behaviours
- Assign ownership and accountability
- Create visible momentum
- Say no to noise

In short: **move from enablement as a department to enablement as a mindset**.

LEADERSHIP IMPERATIVES ACROSS FOUR STRATEGIC DIRECTIONS

Sales leaders in 2026 are not navigating a single course – they're steering through **four distinct currents** of strategic focus. Our conceptual clustering reveals the directions organisations are taking – and each one demands a different leadership lens.

1. Commercial Focus

Initiatives: New-logo acquisition, segment focus, cross-selling, win-back campaigns

What it takes:

- A **clear go-to-market strategy** and ruthless prioritisation: where to hunt, whom to target, which motions to amplify.
- **Data-driven targeting and performance tracking** – no room for gut feeling.
- Above all, a **performance mindset**: accountability, coaching, and high commercial tempo.

Leadership watch-out: Activity ≠ productivity. Stay focused on **quality pipeline** and sustainable wins.

3. Enablement & Excellence

Initiatives: CRM/data hygiene, sales skills, AI tools, process optimisation, win/loss reviews

What it takes:

- A **long-term mindset**: build sales muscle, not quick hacks.
- Investment in **infrastructure and culture** – tools alone won't change behaviours.
- Set clear expectations for usage and **link enablement to results**.

Leadership watch-out: Don't outsource this. **Leaders must be the first adopters** of the systems and behaviours they expect from others.

2. Value & Offering

Initiatives: Solution selling, value-add services, sharpening the value proposition

What it takes:

- **Cross-functional collaboration** with marketing, product, and delivery. Sales can't refine the offering alone.
- Equip teams with **consultative selling skills** and clear value messaging.
- A deep understanding of **customer pain points** and differentiation in saturated markets

Leadership watch-out: Without internal alignment, even the best proposition won't land. Lead the integration, not just the pitch.

4. Strategic Re-alignment

Initiatives: Pricing, cost reduction, GTM restructuring, coverage model redesign

What it takes:

- Courage to make **tough calls**: where to cut, where to reinvest, how to adapt coverage.
- Close alignment with finance and operations – this is **structural strategy**, not just sales execution.
- Prepare teams for **change management** – these shifts impact roles, targets, and incentives.

Leadership watch-out: Restructuring isn't just an Excel exercise. **Communication, trust, and clarity** are make-or-break.

Highlight Boxes

1 “Doing > Dreaming”

2026 is shaping up as a year of visible action, not abstract vision.

Sales leaders are prioritising initiatives with immediate commercial impact – from new-logo acquisition to cross-selling – over long-term transformation.

👉 *Strategic activity is widespread, but the true differentiator is execution velocity, not strategic originality.*

2 “Commercial Focus Takes the Lead”

One-third of all initiatives fall into the Commercial Focus cluster.

Customer-side growth dominates the agenda across industries and regions, suggesting a clear priority: revenue recovery and acceleration.

👉 The sales engine is pointed firmly toward front-line opportunity – not internal optimisation.

3 “Strategic Re-alignment Still in the Shadows”

High-impact initiatives like pricing, coverage redesign, and partner strategy remain underused.

Despite their potential to shape long-term performance, many of these levers are prioritised as “Secondary” or “Rare.”

👉 *Are leaders postponing complexity – or missing a chance to build resilience while chasing quick wins?*

TURNING THE TIDE – HOW MERCURI HELPS NAVIGATE SALES TRANSFORMATION

From strategic intent to commercial impact, guided by experience.

Across all industries and regions, the survey reveals a striking pattern: **strategy is not the issue – implementation is**. Sales leaders have no shortage of ideas or directions. In fact, we saw more initiatives selected per respondent than in previous years. But behind the activity lies a deeper concern: **will it translate into measurable impact?**

The data points to three recurring bottlenecks:

- **Disconnected initiatives** – without prioritisation or cohesion, teams risk spreading themselves too thin.
- **Capability bottlenecks** – even good ideas fail without the right skills, systems, and tools behind them.
- **Lack of measurable follow-through** – initiatives often fade into PowerPoint, never reaching execution.

Mercuri doesn't claim to have silver bullets. But what we do have is **a track record of translating strategic direction into operational momentum**. In the following sections, we share how – within each of the four strategy clusters – we help clients turn ambition into achievement.

Because **a strategy without traction is just drift**.

Commercial Focus – Trimming the Sails for Forward Momentum

Turning pipeline pressure into focused commercial energy.

New-logo acquisition, reactivation of dormant customers, cross-selling, and better customer segmentation: this cluster represents the **core engine of commercial growth** – and the clearest signal that 2026 is set to be a year of *doing*, not just planning.

But from our experience, this is also where initiatives stall most often. Not due to lack of ambition, but because execution remains too generic.

To get traction here, companies need:

- **Sharper commercial plays:** Specific target segments, clear battlecards, and playbooks that go beyond motivational slogans.
- **Consistent sales routines:** New acquisition or cross-selling won't happen unless daily behaviours and expectations shift.
- **Field-ready enablement:** Not another strategy deck, but tools and competencies that land in the hands of sellers – and stick.

At Mercuri, we support this shift by helping clients define **practical go-to-market moves**, **embed them in the sales rhythm**, and **equip frontline teams** to execute with focus and confidence.

Whether it's via structured acquisition sprints, key account playbooks, or cross-/upselling programs, the key is simple: *commercial energy becomes commercial results when it's channelled, not just announced*.

Value & Offering – Navigating Beyond Price

When competitors race to the bottom, your offer needs to stand taller.

This cluster reflects a shift from *selling what you have* to *crafting what customers truly value*. Solution selling, developing add-on services, and sharpening the value proposition ranked among the top ten initiatives – clear signs that **sales leaders know they can't win on price alone**.

But while the strategic intent is there, implementation often gets stuck in internal loops: redefining offers, revisiting presentations, reworking messaging – but **rarely re-skilling the salesforce** or pressure-testing value in the field.

What's needed to make this cluster move:

Offer-to-market alignment: Clearly defined value propositions per segment that reflect customer economics, not internal structures.

Sales play shifts: From product push to business case thinking – sellers must articulate how value is created and captured.

Customer validation: Real market feedback, not just boardroom narratives, to refine messaging and delivery.

Mercuri helps organisations make this transition real – by designing **value playbooks**, training teams in **consultative and solution-based selling**, and supporting the rollout with **coaching on live deals**. We bring together product logic and sales logic – because one without the other won't hold water.

Enablement & Excellence – Trimming the Sails, Not Just Building the Ship

You can't navigate new waters with old routines.

This cluster – covering sales capabilities, process improvements, CRM hygiene, and use of AI – sits at the operational heart of most sales strategies. It's where vision meets the reality of execution. And yet, as the data shows, **many of these initiatives remain “relevant” but not prioritised** – caught in the middle between intent and action.

The implementation gap here is often not one of awareness, but of **orchestration**. Companies know they need better data, tools, and skills – but fail to connect these to commercial outcomes. The result? Training that doesn't stick, tools that aren't used, and dashboards that track everything except momentum.

What's needed to make this cluster move:

Tie enablement to initiatives: Build capabilities in the context of strategic goals, not as isolated programs.

Operationalise sales excellence: Make process adherence, CRM usage, and tool adoption part of sales culture – not just compliance.

Measure what matters: Shift focus from activities to leading indicators and sales impact.

Mercuri's enablement approach combines **competence development, coaching, and field execution**. We design **modular learning paths**, enable **real-time tool adoption**, and ensure **sales leaders are equipped to lead change**, not just announce it.



Strategic Re-Alignment – Redrawing the Charts Before the Storm

When the winds shift, it's the course – not the crew – that must change.

The initiatives in this cluster point to **more fundamental changes** in how companies go to market: cost-cutting, rethinking pricing, shifting coverage models, or activating new channels. While individually underrepresented in the data, collectively they signal a deeper **strategic re-alignment** – often overdue, often avoided.

Why are these initiatives rare despite market pressure? – Because they're **structural, sensitive, and political**. Changing pricing logic, reworking sales roles, or cutting legacy approaches requires **cross-functional alignment, executive sponsorship, and bravery** – not just good PowerPoint.

From experience, we know this work succeeds only when:

- **Diagnosis precedes design:** Understanding current performance patterns, inefficiencies, and value leakage is the first step.



- **Cross-functional buy-in is secured:** Especially in pricing or coverage changes, Sales alone can't move the needle.
- **Sales is involved early:** Many transformations fail because they are "done to" sales, not *with* sales.

At Mercuri, we combine **commercial diagnostics, change consulting, and execution guidance** to help clients rethink their sales model without losing momentum. Whether it's **value-based pricing, channel mix optimisation, or territory redesign**, we ensure the strategy reaches the front line.

Steering from Strategy to Execution – One Voyage, Four Currents

Strategy charts the course. But it's the crew, the vessel, and the wind that get you there.

The 2026 survey shows: sales leaders know where they need to go — but many are still setting sail without the right conditions on board. Across all four strategic clusters, the challenges are less about vision and more about **execution**:

- **Commercial Focus?** Everyone wants growth — but few are clear on *how* to focus, activate, and follow through.
- **Value & Offering?** There's ambition to differentiate — but little clarity on what the real value is and how to prove it.
- **Enablement & Excellence?** Tools and training are rolled out — but without integration into day-to-day sales work.
- **Strategic Re-Alignment?** Big changes are needed — but few are willing (or able) to challenge old structures.

At Mercuri, we don't believe in generic frameworks or one-size-fits-all solutions. What we bring is a blend of:

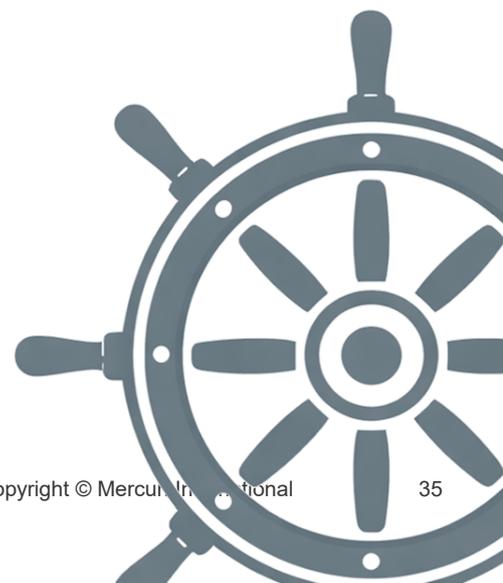
Deep commercial expertise: rooted in global B2B sales practice

Structured, proven methods: tailored to the initiative at hand

Hands-on implementation support: focused on impact, not just input

Because in this market — with sentiment high and targets missed — **momentum isn't accidental**. But strategy *can* work, if it's translated into action with discipline and direction.

Let's get your crew ready. The sea won't calm — but your ship can be stronger.



Thank you very much for your participation and the important and exciting insights.

About the author of the study

Alexander Wolter has been a partner at Mercuri International since 2019 and has extensive experience in designing and implementing training and consulting programs for international companies. He accompanies organizations in optimizing sales structures and processes and supports them in developing customized solutions for their sales teams and management. His expertise covers all essential areas of sales success, from strategic approaches to individual competence development.



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