



Decision code: The new reality of B2B buying

Mercuri International Research
Henrik Larsson Broman



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Introduction: why this study matters



B2B sales has always been built on trust, relevance and value creation. Sellers who understand their customers, build strong relationships and bring solutions that improve the customer's business will always have an advantage.

But in complex B2B buying, that advantage is no longer enough.

Mercuri International's B2B Buying Insights Survey 2026 points to a deeper shift in how buying decisions are made. The central challenge for buyers is not simply to find the right supplier, compare competing offers or access more information. It is to create enough confidence inside the organization to move forward.

Complex purchases now involve larger decision networks, more functions, higher perceived risk and greater implementation consequences. Buyers must align internal stakeholders, manage uncertainty, justify the decision and prepare the organization for change — often before they can commit to a supplier.

This creates a growing gap between how many sales organizations sell and how customers actually buy. Many sellers still focus on presenting value, explaining solutions and progressing opportunities through their own sales process. Buyers, however, are trying to answer a broader set of questions: Is this decision safe? Can we implement it? Will stakeholders support it? Can we defend it internally? What happens if it fails?

This study was created to better understand B2B buying from the buyer's perspective: what triggers purchases, who becomes

involved, how suppliers are identified, how shortlists are formed, what risks buyers perceive, how AI is used, what internal efforts are required and what customers value most from suppliers and salespeople.

The findings suggest that value is no longer only about the strength of the solution, the quality of the product or the size of the business case. In more complex buying situations, value also includes the supplier's ability to reduce uncertainty, align stakeholders, manage perceived risk and build confidence that the decision will succeed.

AI adds another layer to this shift. It will make buyers faster, more informed and better prepared. But it will not remove the human burden of trust, accountability, risk and internal alignment.

The next frontier in B2B sales is therefore not simply better selling. It is decision enablement: helping customers reduce risk, align stakeholders and make decisions they can trust, defend and implement.

The findings point to a clear conclusion: the winning supplier is not simply the one with the strongest offer. It is the one that helps the customer make the decision easier, safer and more compelling to make.

HENRIK LARSSON BROMAN

Mercuri International Research

6 key takeaways from this report

1 The real buyer is the decision network

B2B buying is no longer controlled by one decision-maker. The real buyer is the network of people who influence, evaluate, approve, block, implement and live with the consequences of the decision.

2 The real competition starts before the formal process

Buyers form assumptions, define problems, assess risks and build early views of credible suppliers before the visible sales process begins. The shortlist is often shaped before many sellers know there is a deal.

3 Risk is the hidden force behind slow decisions

Value creates interest, but risk creates hesitation. As perceived risk increases, buying processes become longer, more cross-functional and harder to move forward.

4 The buyer needs help selling the decision internally

B2B purchases require internal alignment, implementation readiness and stakeholder confidence. The seller's role is not only to convince the buyer, but to equip the buyer to convince the organization.

5 AI makes buyers more informed — not necessarily more confident

AI can help buyers search, compare and prepare. But it does not remove the human burden of trust, accountability, risk and internal alignment. Human sales must raise the standard for insight and confidence.

6 Buyers value sellers who help them make progress

Buyers already have access to information. What they value is help making sense of the decision: clarifying the problem, understanding trade-offs, reducing uncertainty and building confidence to act.

The overall conclusion: decision enablement is the new logic of B2B sales

The shift is not simply from product selling to solution selling. It is from managing the seller's sales process to enabling the customer's decision process.

In brief: B2B sales are not won by pushing the customer harder. They are won by helping the customer decide better.

About this study and methodology

How this research was conducted

This report is based on Mercuri International's B2B Buying Insights Survey 2026, a quantitative study designed to better understand how complex B2B purchasing decisions are made.

The survey asked respondents to reflect on a recent B2B purchase in which they had been involved. The purpose was to capture how buying decisions are experienced from the buyer's perspective: what triggered the purchase, who was involved, when suppliers entered the process, how suppliers were evaluated, what risks were considered, how AI was used, what internal efforts were required and what buyers valued most from suppliers and salespeople.

The survey was distributed to a database of decision-makers within Mercuri International's network. It was also made available as an open survey and distributed through selected channels, including LinkedIn.

The analysis covers different types of B2B purchases, ranging from traditional product purchases to highly complex purchases involving multiple stakeholders, functions, perceived risks and implementation consequences. Throughout the report, results are compared across purchase types where the data allows.

Because not all respondents answered every question, base sizes vary across analyses. The base size for each figure is therefore reported separately in the figure notes. Some subgroup analyses should be interpreted as directional rather than conclusive, especially where sample sizes are small.

The study is based on self-reported data and reflects respondents' reported experiences and perceptions of recent purchasing processes. The goal is not only to describe B2B buying behavior, but to understand what it means for sales organizations.

Key methodological notes

Survey type: Quantitative survey.

Perspective: Buyer-reported experiences of recent B2B purchases.

Distribution: Sent to a database of decision-makers in Mercuri International's network and distributed as an open survey through selected channels, including LinkedIn.

Unit of analysis: A recent B2B purchasing decision in which the respondent had been involved.

Purchase types analyzed: Standardized product/service, customized product/service, and fully tailored solutions.

Base sizes: Vary by question and analysis. Each figure includes its own base size.

Multiple-response questions: For questions where respondents could select more than one option, percentages do not sum to 100%.

Interpretation: The study is intended to provide practical insight into modern B2B buying, not to claim universal or deterministic laws of buyer behavior.

The new realities of B2B buying

1. B2B buying has become a decision network

The underlying shift

B2B buying is no longer best understood as a linear purchasing process led by a single decision-maker. It is increasingly a networked decision journey shaped by multiple stakeholders, functions, roles and risk perspectives.

In many sales organizations, the mental model of the buyer is still too narrow. Sellers often search for “the decision-maker”, try to qualify the formal budget owner, or focus primarily on procurement and the main business sponsor. But complex purchases rarely move forward because one person is convinced. They move forward when enough people inside the customer organization believe that the decision is strategically relevant, financially justified, operationally feasible, technically sound and low-risk enough to support.

This represents a fundamental shift. The real buyer is not one person. The real buyer is the decision network.

For sales organizations, this changes the nature of complex selling. Winning is no longer only about understanding customer needs, presenting a strong solution and building a relationship with the formal buyer. It is about understanding how decisions are shaped inside the customer organization: who influences the criteria, who owns the risk, who controls the budget, who will implement the solution, who may block the decision, and who must live with the consequences after the contract is signed.

What our survey shows

Our 2026 B2B Buying Insights Survey confirms that complex buying processes now involve a broader and more distributed set of stakeholders than traditional sales models often assume. The study was designed around specific, recent B2B purchases where respondents had been personally involved, and where the purchase was important and relatively complex rather than routine or administrative.

Buying teams are larger than traditional sales models assume

Across the analyzed purchases, the average buying process involved around five people from the customer organization. However, when isolating the most complex deals, the average number of people involved increased to 6.8.

This confirms a long-term trend identified in Mercuri’s previous research. In the 2007 study, the average deal involved 2.1 decision-makers.¹ In the 2024 Future State of Sales study, respondents estimated that the average B2B buying process involved 4.5 decision-makers, rising to 5.5 in complex deals.² In the 2026 buyer study, the most complex deals involved 6.8 people.

This comparison should be interpreted with some caution. The 2024 figure was based on seller estimates, while the 2026 study is based on data from buyers reporting on actual purchases in which they had been involved. That difference in perspective may partly explain the higher figure in 2026. Still, the directional pattern is clear: complex B2B decisions increasingly involve more people, more perspectives and more internal coordination.

¹ ProSales Institute 2007 (Mercuri International Research), Sales Efficiency Study I. n=3237
² Mercuri International Research 2024, The Future State of Sales Skills, n=547

Average number of people involved in B2B purchasing processes

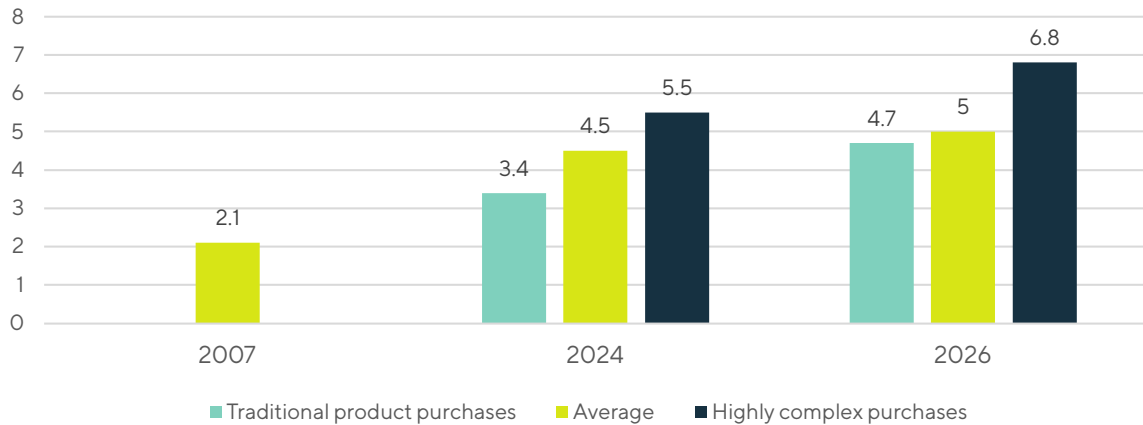


Figure 1: Average number of people involved in B2B buying decisions over time. 2007 (n=3,237), 2024 (n=547) and 2026 (n=117). Note: The 2007 and 2024 results are based on previous Mercuri studies; the 2026 results are based on buyer-reported data from recent B2B purchases.

Complex purchases cut across functions

Stakeholder complexity is not only about the number of people involved. It is also about the number of functions represented in the decision.

The 2026 data shows that complex B2B purchases involve a broad set of internal functions. Across all purchases, the average number of involved functions was 3.3. Standardized product or service purchases involved 2.8 functions on average, while highly complex purchases involved 4.5 functions.

This is an important finding. Even relatively standardized purchases are no longer always isolated within one department.

As organizations become more integrated, purchases increasingly affect processes, systems, data flows, workflows, customer experience, compliance, productivity and cost structures across the value chain.

In practice, buying decisions have become more interdependent. One function may initiate the need, another may control the budget, a third may assess the technical fit, a fourth may evaluate risk, and a fifth may have to implement or use the solution.

This makes the buying process more complex, but it also makes the seller's task more demanding. The seller must understand not only what the customer wants to buy, but how the customer organization must align in order to buy.

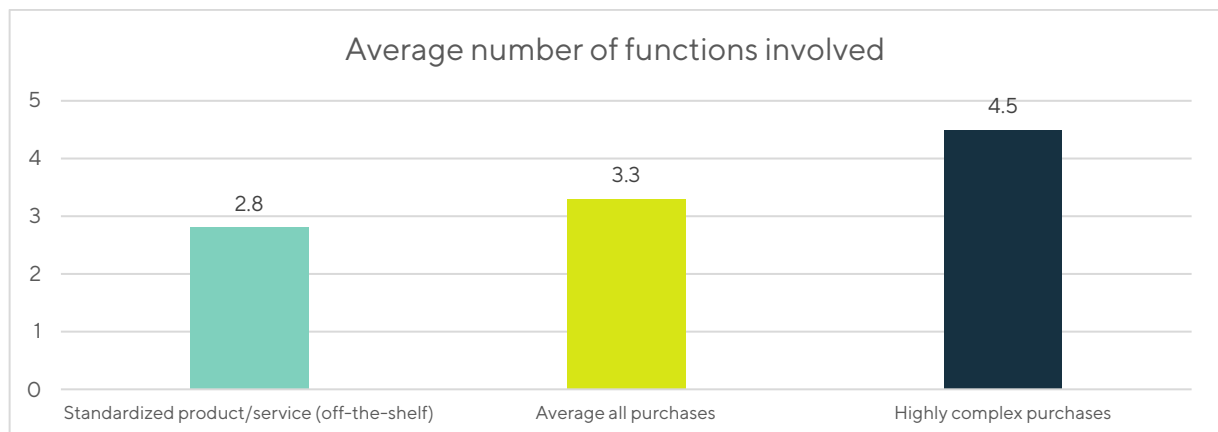


Figure 2: Average number of functions involved in B2B purchases. n=146.

Executive management gets involved when the stakes are high

As the purchase becomes more complex, the decision network does not only become broader — it also becomes more senior

Executive involvement rises sharply as purchase complexity increases. In standardized product purchases, executive management is involved in around 40% of cases. In highly complex purchases, that figure nearly doubles to almost 80%.

The same pattern can be seen for procurement, finance and

quality/risk management. As the stakes rise, the purchase becomes more than a supplier decision. It becomes a business decision with implications for strategy, cost, performance, risk and transformation.

Operational and technical functions also become more involved as complexity increases. Their role is to assess whether the solution can work in practice: whether it can be implemented, integrated, adopted and scaled without disrupting the business. Procurement and finance remain central because the decision must be commercially controlled, financially justified and contractually sound.

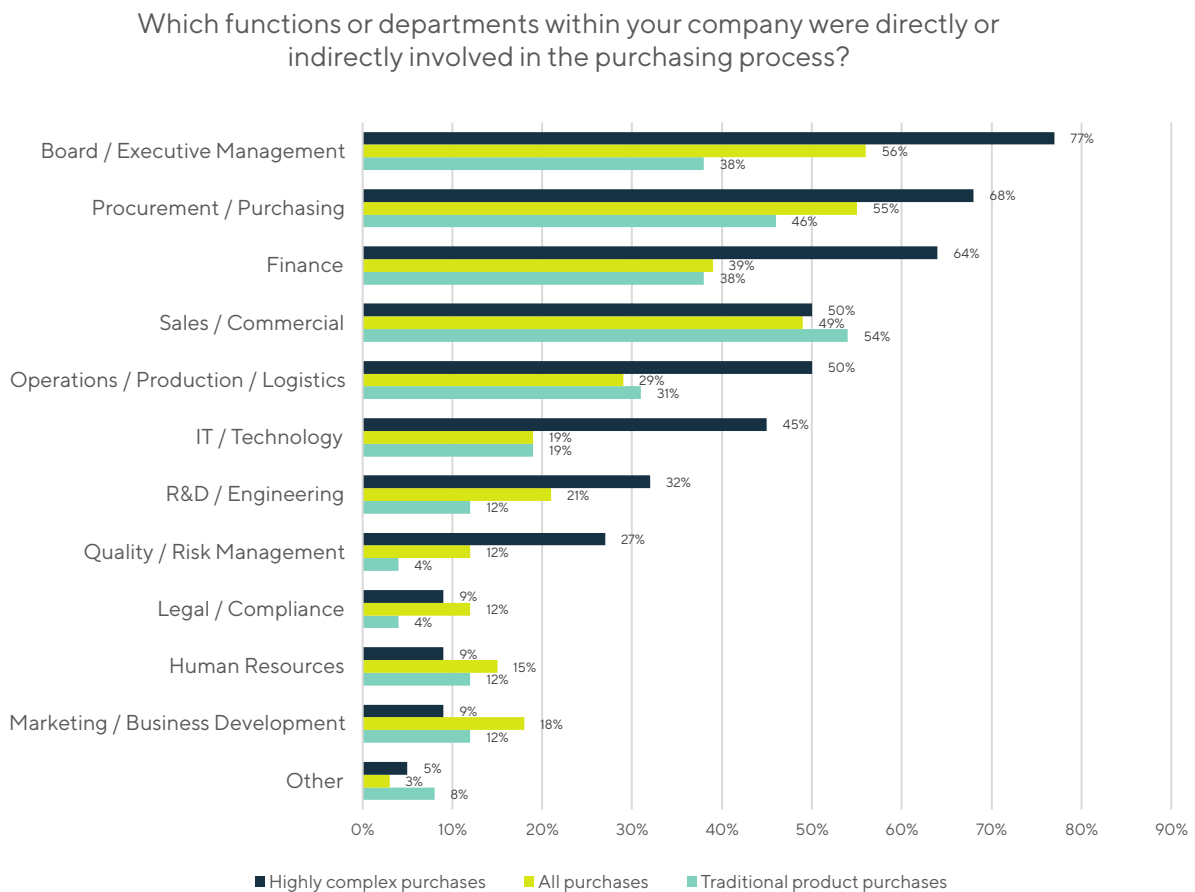


Figure 3: Cross-functional involvement in B2B buying decisions. n=146. Note: Multiple responses allowed.

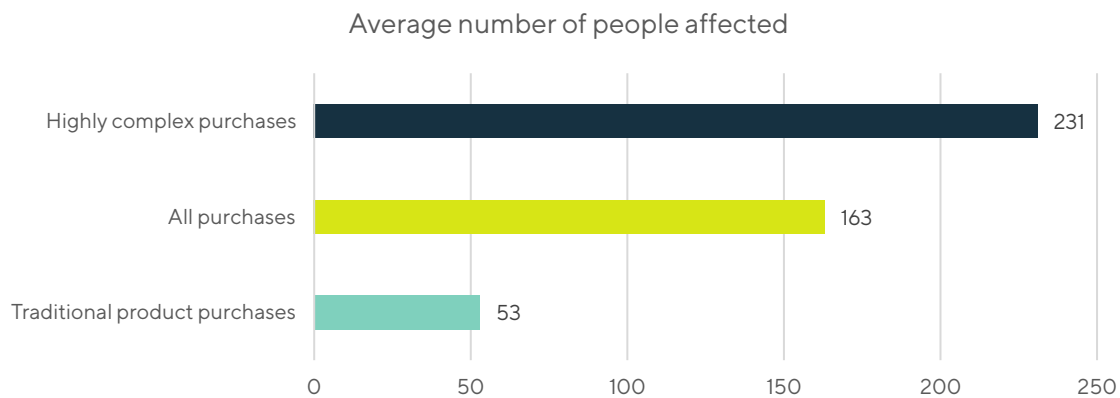


Figure 4: Estimated average number of people affected by the product or service. n=123.

The implication is clear: in complex B2B buying, executive involvement is not simply a sign of senior approval. It is a signal that the purchase carries strategic and organizational consequences. Sellers must therefore be prepared to engage different functions with different definitions of value — and different perceptions of risk.

The impact extends beyond the decision team

Finally, the complexity of a purchase is not limited to those who participate in the decision. It also depends on how many people will be affected once the solution is implemented.

In the total sample, 20% of purchases affected 1–5 people, 30% affected 6–20 people, another 30% affected 21–100 people, 13% affected 101–500 people, and 7% affected more than 500 people.

This matters because the number of people affected changes the nature of the decision. A purchase that affects a small team can often be evaluated primarily on fit, cost and usability. A purchase that affects hundreds of people introduces a different level of organizational risk. It may require training, communication, process changes, adoption support, integration with existing systems and leadership attention.

The 2026 results reinforce this point. Many purchases required internal efforts such as communicating and engaging employees, aligning with existing systems or processes, appointing project or steering teams, changing routines or ways of working, training employees, integrating with other

technologies and measuring impact.

This means that the purchase decision and the implementation challenge are closely connected. For the buyer, the risk is not only choosing the wrong supplier. The risk is choosing a solution that the organization fails to adopt, integrate or turn into business value.

What it means: complex buying is a coordination challenge

B2B buying is no longer driven by a single decision-maker or one dominant buyer contact. The data shows that as purchases become more complex, more functions, more stakeholders and more levels of authority become involved.

This changes the nature of the sale. Different stakeholders do not evaluate the purchase in the same way. Executive management may focus on strategic relevance and business impact. Finance may focus on cost, ROI and budget risk. Procurement may focus on supplier reliability and commercial terms. IT may focus on integration, security and technical feasibility. Operations and users may focus on implementation, usability and disruption.

The challenge for the seller is therefore not only to communicate value to one buyer. It is to understand how different stakeholders define value, risk and success — and to help the customer create enough internal alignment to move forward.

In complex buying, the “real buyer” is the decision network.

Sales implication in brief

Sales teams need to move from managing individual relationships to orchestrating the full decision network.

This means mapping who is involved, what each stakeholder cares about, who owns risk, who controls budget, who can block the decision and who must live with the consequences after implementation.

In brief: Complex deals cannot be managed through single-threaded selling. Sellers need to help the customer's decision network align around value, risk and confidence.



2. The underlying shift: buyers shape the decision before suppliers are invited

Many sales organizations still treat the formal buying process as the start of the opportunity. They wait for a request, an RFP, a meeting invitation or a defined project before they begin to compete.

But in complex B2B buying, the customer's decision journey often starts much earlier.

Before suppliers are formally invited, buyers may already have recognized a business problem, discussed priorities internally, searched for information, compared possible approaches, drawn on previous experience and formed early assumptions about what kind of solution – and what kind of supplier – feels credible.

This means that the visible sales process is often only the later part of the customer's buying journey. By the time a supplier receives an inquiry or invitation to present, the customer may already have developed an initial view of the problem, the perceived risks, the relevant evaluation criteria and which suppliers should be considered.

The key commercial implication is clear: in complex B2B buying, the first battle is not always to win the deal. It is to become relevant, trusted and credible before the formal competition begins.

What our survey shows

Complex buying often starts with improvement pressure and transformation

Across the analyzed purchases, the need for improvement or efficiency is the most common trigger for initiating a buying process. This applies to both traditional product purchases and highly complex purchases.

However, the data also shows an important difference. Highly complex purchases are much more often triggered by broader business change. Strategic transformation is a trigger in 45% of highly complex purchases, compared with only 8% of traditional product purchases. Replacement of an existing solution is also more common in complex purchases, at 36% compared with 19%.

This suggests that complex buying often begins with dissatisfaction, ambition or transformation pressure. These triggers may exist inside the customer organization long before a formal supplier search begins.

For sellers, the earliest opportunity is therefore not necessarily when a buyer announces a project. It is when the customer starts to experience a gap between current performance and desired future state.

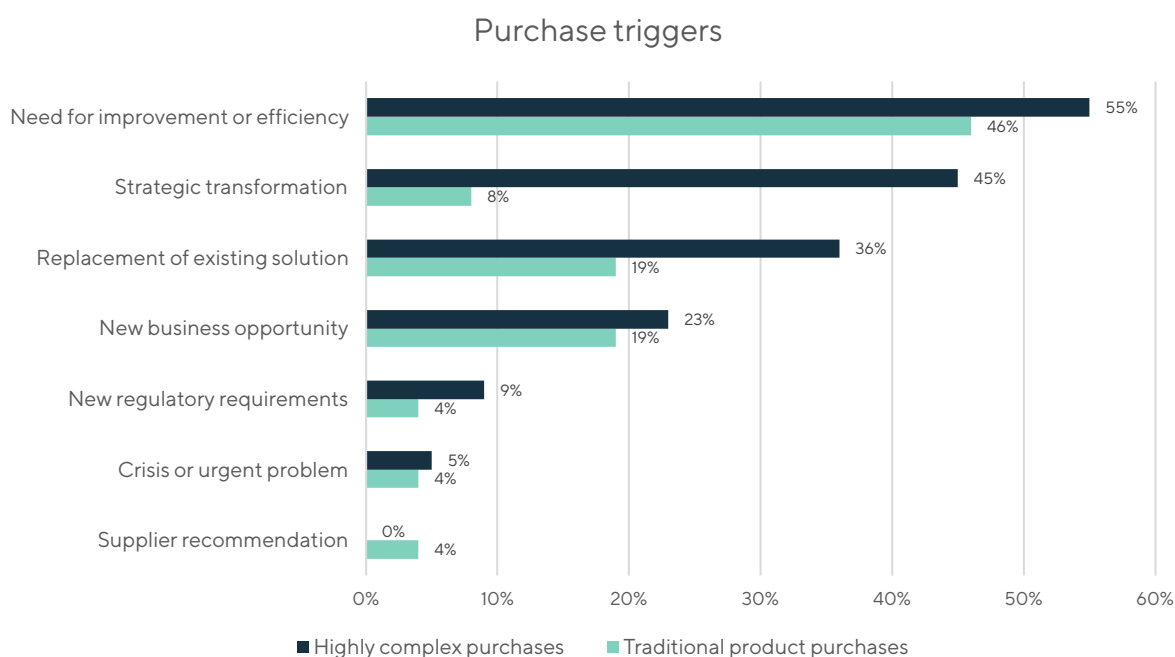


Figure 5: Purchase triggers by type of purchase. Multiple responses allowed, n=146.

Supplier discovery is shaped by trust, familiarity and credibility

When buyers identify or invite potential suppliers, they do not start from a blank slate. Especially in highly complex purchases, supplier discovery is strongly shaped by existing relationships, reputation, references and recommendations.

In highly complex purchases, existing supplier relationships are the most common source of supplier identification, selected in 73% of cases. Industry reputation or brand is cited by 45%, recommendations from professional networks by 41%, customer references by 27% and internal recommendations by 27%.

Online search or research also plays a role, but at a lower level, cited by 23% of highly complex purchases.

The pattern is important. In complex buying, buyers are not simply searching broadly for the best possible supplier. They are looking for credible options that reduce uncertainty. Existing relationships, reputation, references and professional recommendations all serve the same deeper function: they make the supplier feel safer to consider.

How were potential suppliers identified or invited for this purchase?

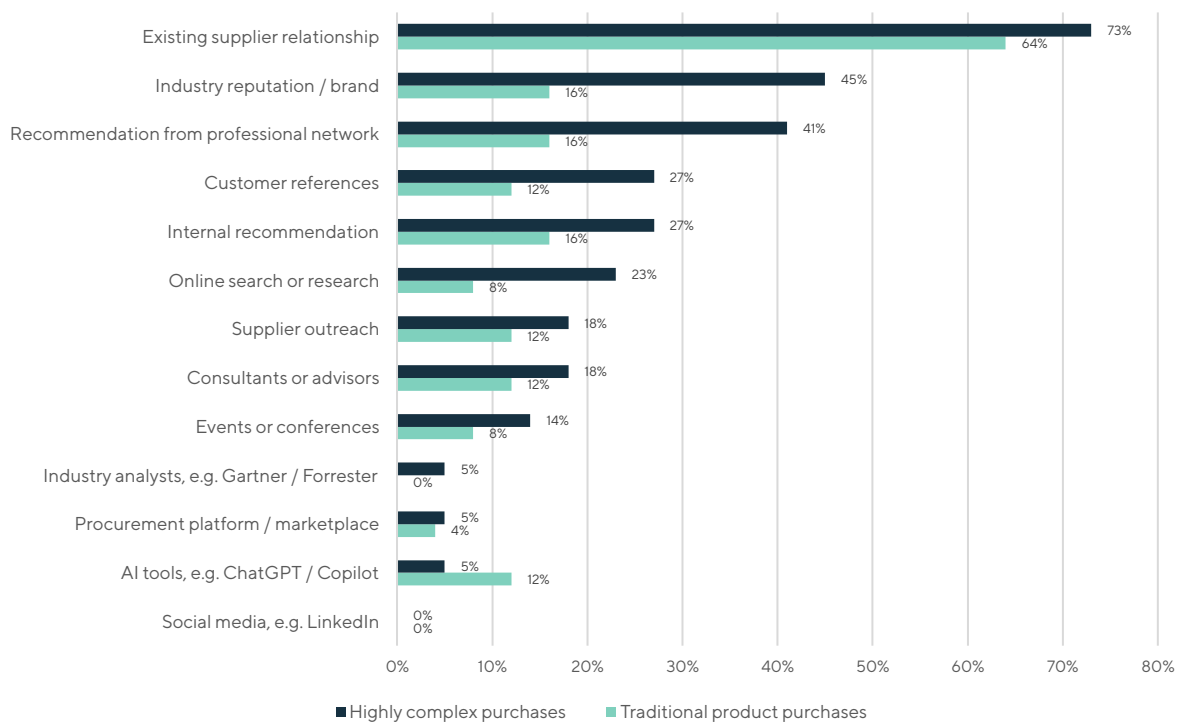


Figure 6: How potential suppliers were identified or invited. n=146. Note: Multiple responses allowed.

One notable finding is that social media, including LinkedIn, was not identified as a direct source for inviting or identifying suppliers. This does not mean social media has no role in B2B influence. It may still shape awareness, reputation and thought leadership indirectly. But the data suggests that when buyers make actual supplier-invitation decisions, they rely more on trust-based and evidence-based sources.

The conclusion is not that digital presence is unimportant. Rather, digital presence must build credibility before the buying process becomes active.

Supplier dialogue helps define what matters

The data also shows that suppliers can influence how buyers define what matters in the decision — particularly in highly complex purchases.

In highly complex purchases, 77% of respondents say supplier presentations or discussions influenced how they defined what mattered in the buying decision. In traditional product purchases, the corresponding figure is only 24%.

This is one of the most important findings in the chapter. It suggests that in complex deals, suppliers are not merely evaluated against pre-existing criteria. They can help shape the criteria themselves.

But this influence is unlikely to come from generic product presentations. It is more likely to come from helping the customer understand the problem, clarify priorities, evaluate risks, compare alternatives and define what a successful decision should look like.

Taken together, these findings reinforce a central point: complex buying requires several forms of confidence. Buyers look to their own experience, external recommendations, structured documentation, research and supplier dialogue to define what matters.

The supplier's opportunity is therefore not only to provide information. It is to help the buyer make sense of information.

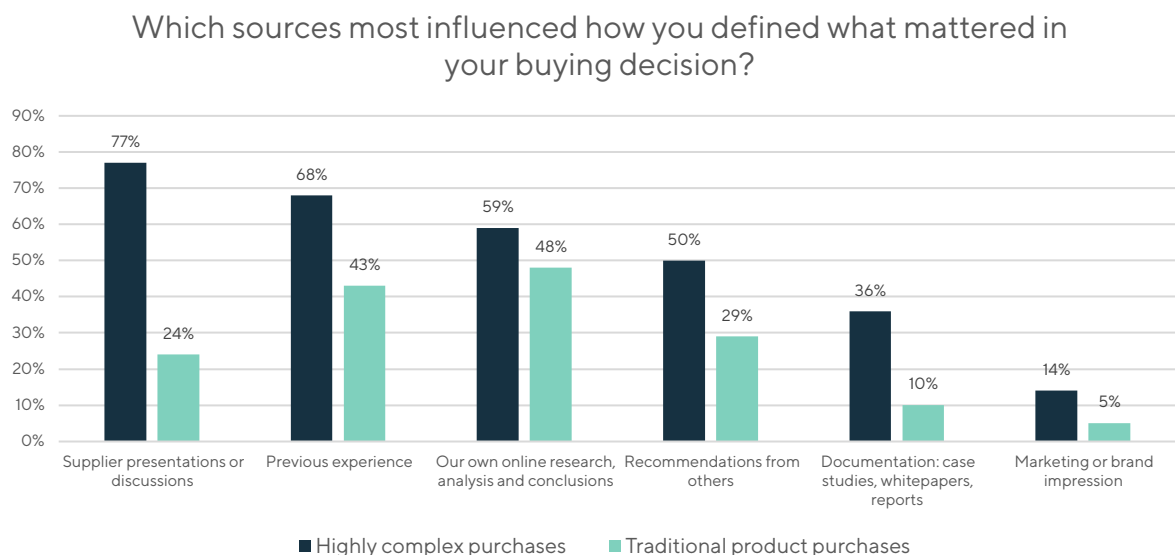


Figure 7: Sources that influenced how buyers defined what mattered in the decision. n=116. Note: Multiple responses allowed.

The selected supplier is usually engaged early

In highly complex purchases, the selected supplier is rarely a late entrant. In 87% of highly complex purchases, the supplier that was eventually selected was engaged before the buyer recognized the need, very early in the process or early in the process.

More specifically, 5% of highly complex purchases involved a supplier that helped define the need, 59% engaged the selected supplier very early in the process, and 23% engaged the selected supplier early in the process. No highly complex purchases in the analysis show the selected supplier entering late or very late in the process.

The implication is not simply that suppliers should “get in early”. The deeper point is that early engagement creates a chance to shape the customer’s decision logic. Suppliers that enter late may still compete, but they often do so within a framework that has already been influenced by others.

If supplier discussions strongly influence what matters in highly complex purchases, and selected suppliers are typically engaged early, then early supplier engagement becomes a strategic advantage. It allows the supplier to move from responding to demand to helping shape demand.

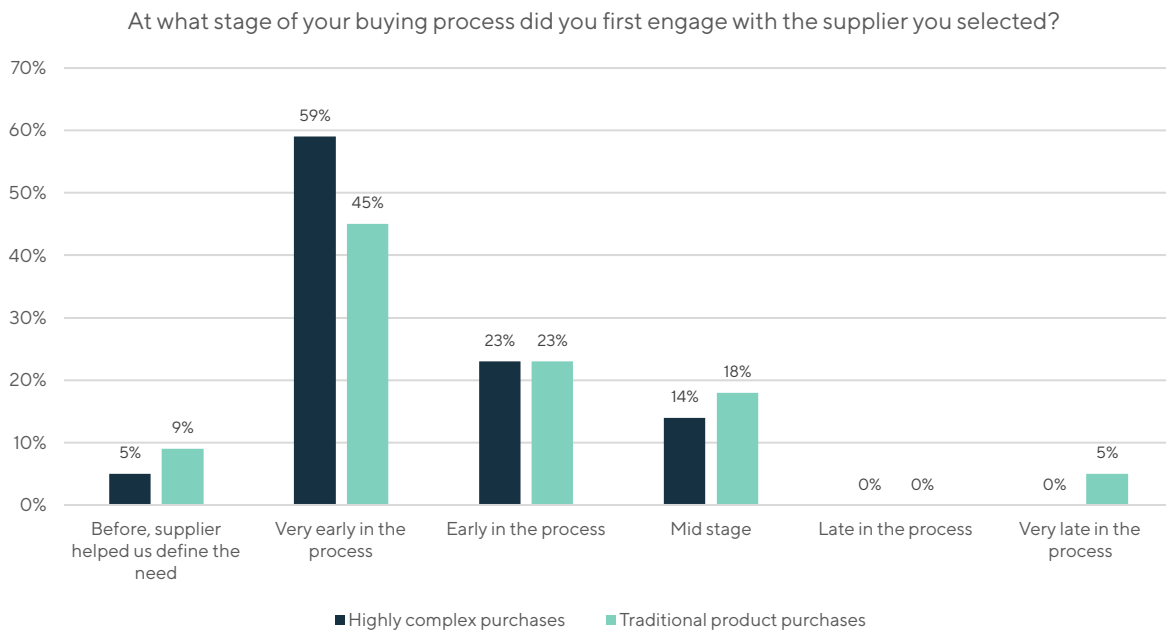


Figure 8: Stage at which buyers first engaged with the selected supplier. n=118.

Buyers typically evaluate around three suppliers

Across the analyzed purchases, buyers evaluated an average of approximately three suppliers. The difference between traditional product purchases and highly complex purchases is small: traditional product purchases involved an average of 3.1 suppliers, while highly complex purchases involved an average of 3.2 suppliers.

This is a striking finding. One might expect complex purchases to involve a much broader supplier search. Instead, the data suggests that buyers manage complexity by limiting the number of suppliers they evaluate.

Most buyers do not search the entire market. They create a manageable shortlist of credible alternatives.

In highly complex purchases, 18% evaluated one supplier, 50%

evaluated two to three suppliers, and 27% evaluated four to six suppliers. Only 5% evaluated seven to ten suppliers, and none evaluated more than ten.

This suggests that “three suppliers” may function as a practical rule of thumb in B2B buying. It gives buyers enough comparison to feel that they have explored alternatives, but not so many options that the evaluation becomes inefficient or unmanageable.

The implication is clear: the competitive arena is narrower than many suppliers assume. If only around three suppliers are evaluated on average, being outside that group is not a minor disadvantage. It may mean that the real opportunity has already passed.

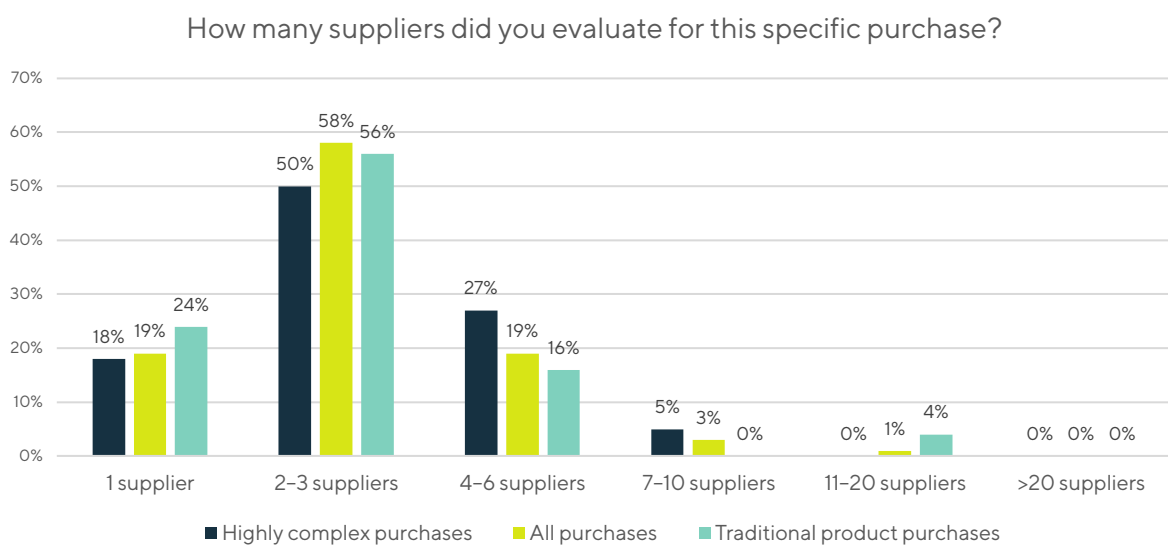


Figure 9: Number of suppliers evaluated by type of purchase. n=122.

Be on the shortlist — or risk being irrelevant

The strongest finding in this chapter is that selected suppliers are usually included in the buyer's initial shortlist.

In highly complex purchases, 91% of selected suppliers were already on the initial shortlist. This includes 41% that were existing suppliers and 50% that were new suppliers already included in the initial shortlist. Only 5% of the selected suppliers entered later in the process, while another 5% were not on the initial shortlist.

For traditional product purchases, the pattern is even more incumbent-driven. 82% of selected suppliers were existing suppliers on the initial shortlist, while 14% were new suppliers already on the shortlist.

The most important difference between traditional and complex purchases is not whether the selected supplier was on the

shortlist. In both cases, early inclusion matters. The difference is what kind of supplier wins.

In traditional product purchases, the selected supplier is overwhelmingly likely to be an existing supplier. This suggests that for more standardized purchases, familiarity, operational convenience and reduced switching risk strongly favor incumbents.

In highly complex purchases, the picture is more open. Half of the selected suppliers were new suppliers — but they were still on the initial shortlist. This is a critical nuance. Complex purchases do not necessarily go only to incumbents. New suppliers can win. But they rarely win by entering late. They win by becoming credible early.

This finding reframes how sales organizations should think about opportunity creation. The goal is not simply to find active buying processes. The goal is to be known, trusted and relevant before the shortlist is formed.

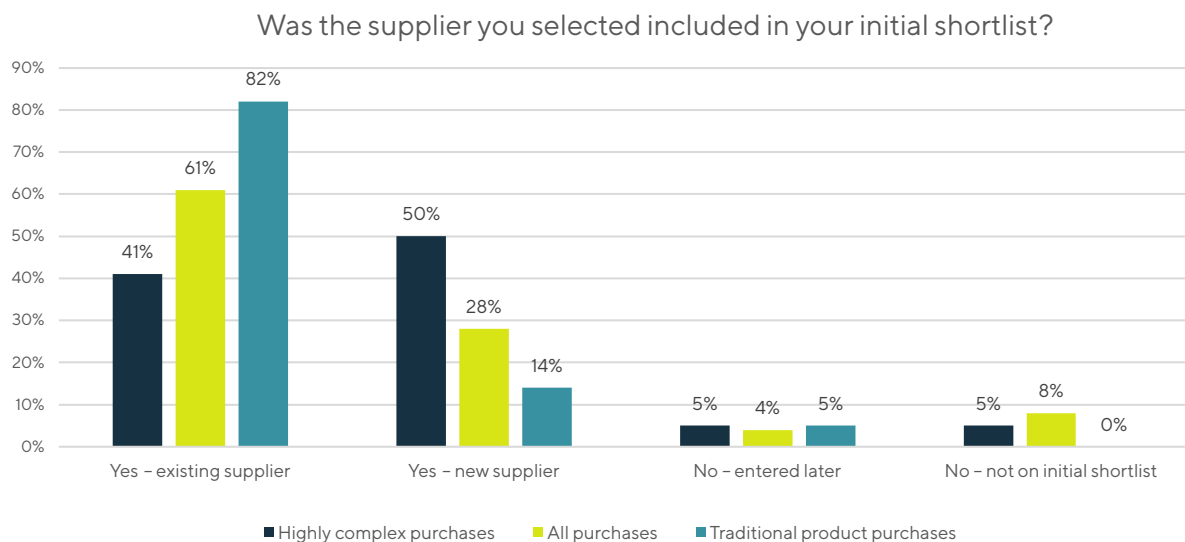


Figure 10: Whether the selected supplier was included in the initial shortlist. n=120.

Critical insight

Early involvement wins

Complex B2B deals are rarely won by late entrants. 87% of selected suppliers in complex purchases were engaged before, very early or early in the buying process. 91% were

already on the buyer's initial shortlist. And complex buying is not closed to challengers: 50% of selected suppliers in complex purchases were new suppliers — but they were already on the initial shortlist.

Implication: Create the conversation before the requirement is fully defined.

What it means: the shortlist is shaped before the formal competition begins

The data shows that complex B2B buying often begins before the formal sales process is visible.

Buyers are triggered by improvement needs, transformation pressure and replacement challenges. They identify potential suppliers through relationships, reputation, references, recommendations and research. Supplier discussions, previous experience and supporting evidence then help define what matters in the decision.

This means the buying journey should not be understood as a process that starts when the customer contacts suppliers. It starts when the customer begins to recognize a business issue, compare possible ways forward and build confidence around what kind of solution — and what kind of supplier — could help.

The shortlist is therefore not just an administrative step. It is the outcome of earlier trust, visibility, reputation, experience and perceived fit.

For sales organizations, this changes the meaning of “early stage”. Early stage is not only a CRM category. It is the period

when the customer is still forming the problem, shaping the criteria, assessing risk and building an internal view of what a good decision looks like.

This is where influence is created.

Suppliers that enter late may still compete, but they often compete against a decision logic they did not help shape. They may be asked to respond to criteria that favor another supplier, address risks that have already been framed by someone else, or compete in a shortlist where trust and familiarity have already narrowed the field.

At the same time, complex deals create opportunities for new suppliers. The fact that 50% of selected suppliers in highly complex purchases were new suppliers on the initial shortlist is important. It suggests that complex buying is not simply an incumbent-protection mechanism. When the purchase is strategically important, transformation-driven or requires new capabilities, buyers may actively consider new options.

But those suppliers need to be credible before the shortlist closes.

Sales implication in brief

Sales and marketing cannot wait until the customer formally enters the market. In complex B2B buying, that may already be too late.

The task is to build trust, visibility and relevance before demand becomes formal. This includes thought leadership, customer proof, references, executive relationships, category reputation, account-based marketing and proactive engagement around the business triggers that create change.

For existing suppliers, customer success and account management become future growth engines. The way the supplier delivers today shapes whether it is trusted tomorrow.

For new suppliers, the message is equally clear: complex purchases can open the door to challengers, but not if they wait for the RFP. They need to earn credibility through insight, proof, relevance and early problem-shaping before the shortlist is formed.

In brief: The shortlist is not new — but the battle to get on it is moving earlier. In complex B2B buying, winning starts before the formal evaluation. Suppliers must earn trust, relevance and credibility before the customer decides whom to consider.



3. Risk is the hidden force behind slow decisions

The underlying shift: value makes buyers interested – risk makes them hesitate

In B2B sales, value is often what gets the customer's attention. Risk is what slows the decision down.

Buyers do not delay complex purchasing decisions simply because they lack information. They often delay because the decision carries consequences. The solution may be difficult to implement. Employees may resist adoption. Productivity may drop during the transition. Collaboration with the supplier may not work as expected. Legal, compliance, security or reputational risks may need to be reviewed before the organization is willing to move forward.

This means that complex B2B buying is not only a search for upside. It is also a process of protecting the organization from downside.

The data suggests that perceived risk is one of the strongest drivers of buying complexity. As the number of perceived risks increases, buying processes become longer and more stakeholders become involved. Strategic importance matters, but it is not enough on its own to explain why decisions slow down. What appears to create decision friction is the perceived risk attached to the purchase – especially risks related to implementation, adoption, productivity, compliance and business impact.

For sales organizations, this changes the commercial challenge. It is not enough to communicate value. Sellers must also reduce the buyer's perceived risk of making the wrong decision.

What our survey shows

Complex purchases carry a broader risk profile

In the survey, respondents were asked which concerns or risks their organization considered when making the purchase. The results show a clear pattern: highly complex purchases carry a broader and more intense risk profile than traditional product purchases.

The most common perceived risk across all purchases is that implementation may take longer or cost more than expected. This risk is especially prominent in highly complex purchases, where it is cited by 77% of respondents, compared with 40% in traditional product purchases.

Several other risks show the same pattern. In highly complex purchases, 64% considered the risk that collaboration with the supplier may not work, 55% considered the risk that employees may resist adopting the solution, 50% considered the risk that customer satisfaction may decline, and 50% considered the risk that employee motivation or satisfaction may decline.

This shows that the dominant concerns in complex buying are not primarily about price or supplier selection. They are about whether the organization can successfully implement, absorb and benefit from the solution.

The key conclusion is that complex purchases create risk beyond the commercial transaction. They create operational, organizational and human risk. Buyers are not only asking: "Is this the right supplier?" They are also asking: "Can we make this work inside our organization?"

This is why risk plays such a central role in complex B2B buying. A strong business case may create interest, but implementation confidence is often what allows the decision to move forward.

Perceived risks across different types of purchases

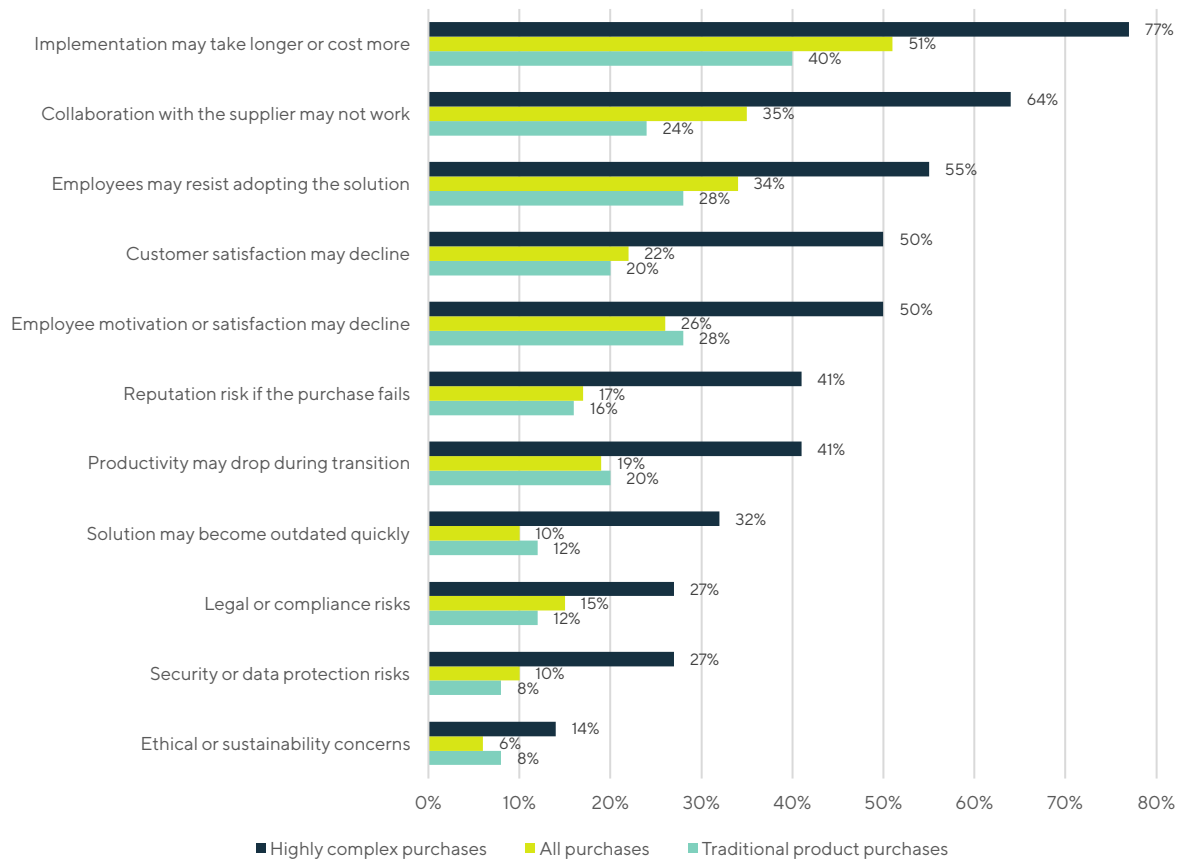


Figure 11: Perceived risks by type of purchase. n=117. Note: Multiple responses allowed.

Critical insight

Implementation risk is the real barrier

Buyers are not only afraid of choosing the wrong supplier. They are afraid the decision will not work inside their organization.

In complex purchases, 77% cite implementation taking longer or costing more than expected as a risk. 64% worry that collaboration with the supplier may not work, and 55% worry

that employees may resist adopting the solution.

The real barrier is often not price. It is implementation confidence.

Implication: Sell against implementation risk early: references, rollout plans, governance, realistic timelines and adoption support.

The consequence: complex buying processes now take around seven months

The average buying cycle in the 2026 study, measured from initial need recognition to final purchase, was 4.6 months. For highly complex purchases, the average increased to 6.9 months.

This is broadly in line with Mercuri's 2024 findings on complex sales cycles, where complex deals averaged 6.8 months. It also confirms the long-term development seen in previous Mercuri research: B2B buying and selling cycles have become longer as decisions involve more stakeholders, more internal coordination and more risk evaluation.

However, the average hides significant variation. Some purchases move quickly, especially when the need is clear, the supplier is known and the perceived risk is contained. Others become extended internal decision journeys because the purchase affects several functions, requires implementation effort, creates organizational consequences or carries higher perceived risk.

This is an important distinction. Long buying cycles are not always a sign of poor sales execution or weak customer interest. In many cases, they are a sign that the buyer is trying to manage risk before committing.

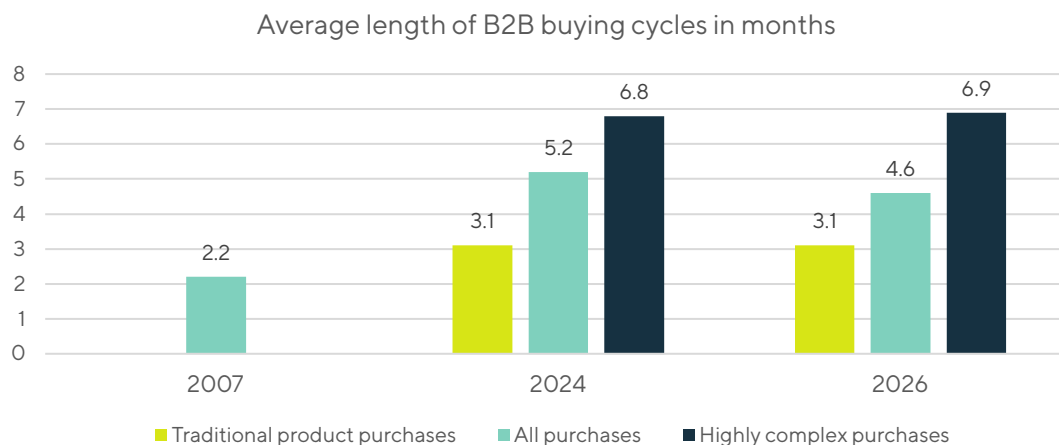


Figure 12: Average length of B2B buying cycles over time. n=3,237 / n=547 / n=117. Note: The 2007 and 2024 results are based on previous Mercuri studies; the 2026 results are based on buyer-reported data from recent B2B purchases.

The more risks buyers perceive, the longer the buying process becomes

The relationship between perceived risk and buying-cycle length is clear. Purchases with 0–1 identified risks took an estimated 3.1 months on average. Purchases with four or more identified risks took 7.5 months on average.

In other words, the buying process more than doubles when the risk profile becomes more complex.

This does not prove that risk alone causes longer buying cycles. The relationship is likely influenced by purchase complexity, strategic importance, number of stakeholders and type of solution. But the pattern is commercially important: as buyers identify more risks, they appear to need more time to evaluate, align internally and create confidence before making a decision.

The implication for sales organizations is clear. If sellers want to accelerate complex deals, they should not only push for the next step. They need to identify and reduce the risks that are creating hesitation.

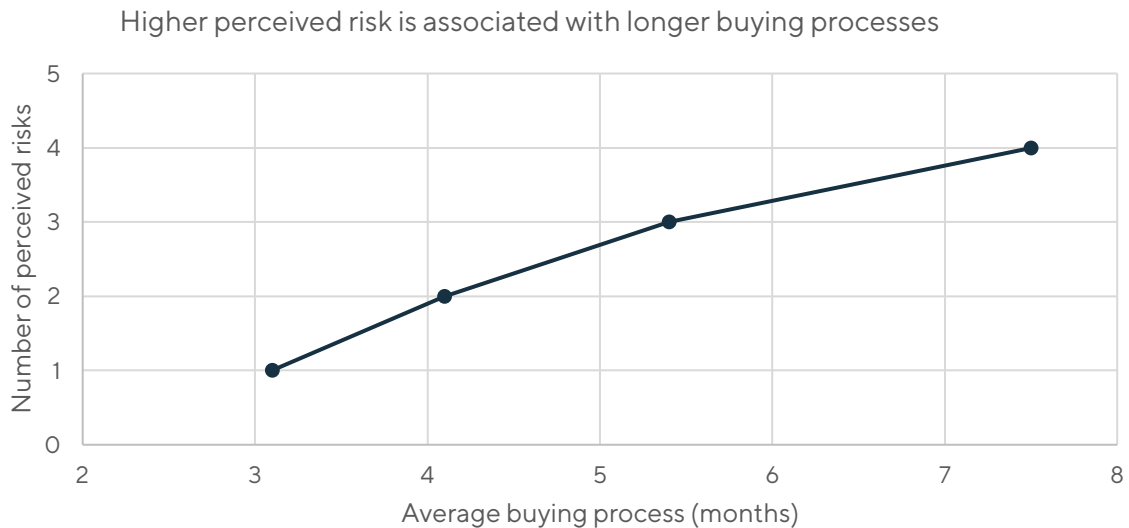


Figure 13: Higher perceived risk is associated with longer buying processes. n=117. Note: Average buying-cycle length by number of perceived risks.

Higher perceived risk expands the buying network

Risk does not only slow decisions. It also appears to expand the buying network.

Purchases with 0-1 identified risks involved an estimated 4.5 people on average. Purchases with four or more identified risks involved 6.6 people on average. This suggests that as perceived risk increases, more stakeholders are pulled into the decision.

This is logical. Different risks are owned by different stakeholders. Compliance risk may bring in legal. Security risk may bring in IT. Financial risk may bring in finance. Implementation risk may

bring in operations. Adoption risk may bring in users, HR, change leaders or line managers. Strategic risk may bring in executive management.

This means that risk and stakeholder complexity reinforce each other. The more risks buyers perceive, the more people they need to involve. The more people they involve, the more perspectives, concerns and criteria the buying process must reconcile.

For sellers, this means that risk management and stakeholder management are inseparable. To manage the deal, sellers must understand who owns each risk inside the customer organization.

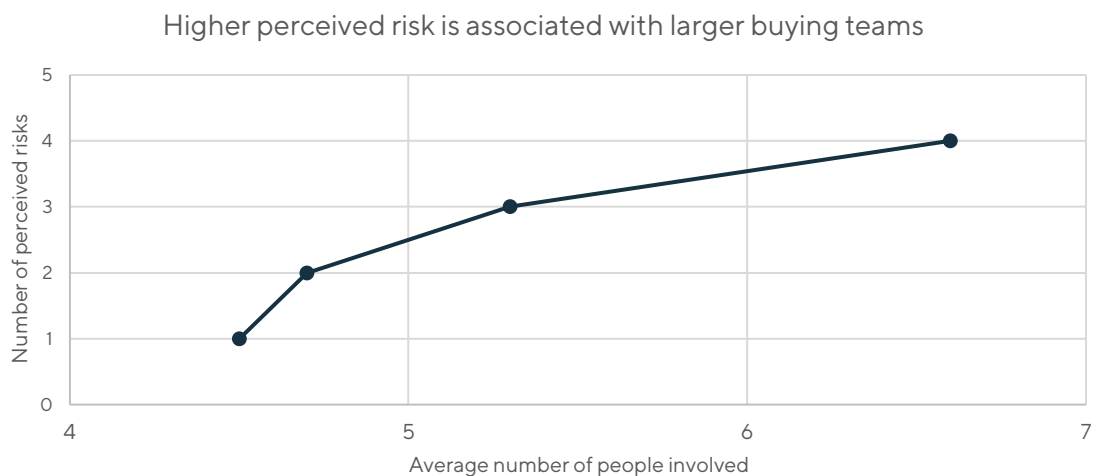


Figure 14: Higher perceived risk is associated with broader buyer involvement. n=117. Note: Average number of people involved by number of perceived risks.

Some risks slow the decision more than others

Implementation risk is the most common concern in complex purchases, but it is not the only risk that matters. Some risks appear to be especially associated with longer buying processes.

The strongest signal in the data is legal or compliance risk. When legal or compliance risks are perceived, the average buying process is 7.8 months, compared with 4.0 months when this risk is not perceived. This is intuitive. Compliance-related concerns often require additional review, more formal approvals, lower tolerance for uncertainty and involvement from functions outside the core buying team.

Security or data protection risk also appears to extend the process significantly. When this risk is present, the average buying process is 6.9 months, compared with 4.4 months when it is not present. Security and data risks often introduce additional control points, technical reviews, legal scrutiny and risk-management processes.

Reputation risk is another important driver. When buyers believe that the purchase could damage the organization's reputation if it fails, the average buying cycle increases to 6.6 months. This suggests that reputational exposure makes the decision more sensitive, requiring more evidence, more internal confidence and more careful supplier evaluation.

Employee adoption risk is particularly commercially important. When buyers worry that employees may resist adopting the solution, the average buying process is 6.2 months, compared with 3.8 months when this risk is not present. This indicates that adoption risk turns the purchase into a change-management decision. The buyer is not only evaluating the supplier; the buyer is evaluating whether the organization can change.

The pattern is clear: the risks that slow buying decisions most are those that create internal uncertainty, increase the need for control or raise the consequences of failure. Legal, security, reputation and adoption risks are not simply evaluation criteria. They are decision barriers.



Figure 15: Risks associated with longer buying processes. n=117. Note: Average buying-cycle length when each risk was perceived versus not perceived.

What it means: risk is what turns buying into hesitation

The data shows that complex B2B buying is not only driven by value creation. It is also shaped by risk avoidance.

Buyers may see the potential upside of a solution and still hesitate. The reason is that complex purchases carry consequences beyond the purchase itself. The solution may be difficult to implement. Employees may resist adoption. Productivity may decline during transition. Collaboration with the supplier may not work as expected. Legal, compliance, security or reputational risks may need to be managed.

This means that the buying process is not simply a rational comparison of supplier value propositions. It is also an internal process of making the decision feel safe enough to approve.

As perceived risk increases, the decision becomes slower, more political and more cross-functional. More stakeholders become

involved because different risks belong to different parts of the organization. Finance evaluates financial exposure. IT evaluates security and integration risk. Legal evaluates compliance. Operations evaluates disruption. Executives evaluate strategic and reputational consequences.

The key point is that risk does not only delay the decision. It changes who needs to be involved, what evidence is required and what the customer must believe before moving forward.

In complex B2B buying, value may create interest – but risk determines whether the customer is ready to act.



Sales implication in brief

Sales teams cannot rely only on communicating value. In complex deals, they must also help customers reduce perceived risk.

This means identifying the risks that matter most early in the buying process and addressing them with the right evidence. Implementation risk requires a credible roadmap. Adoption risk requires change support and training. Financial risk requires a robust business case. Security risk requires validation and documentation. Supplier risk requires references, proof of delivery and transparency.

The goal is not to claim that the purchase is risk-free. That would reduce credibility. The goal is to show that the risks are understood, manageable and actively controlled.

For sales leaders, risk reduction should become a core sales capability – not something handled late in procurement or implementation. A deal should not be considered advanced simply because a proposal has been sent. It should be considered advanced when the customer's main perceived risks have been identified, addressed and accepted by the relevant stakeholders.

In brief: Buyers are not only evaluating upside. They are protecting themselves from downside. Sellers that want to accelerate complex deals must do more than prove value – they must reduce uncertainty and make the decision feel safer to make.



4. Internal alignment is now part of the seller's job

The underlying shift: customers are not only buying a solution — they are preparing for change

Perceived risk is not the only force that slows down B2B buying decisions. Another powerful driver of complexity is the internal effort required to make the solution work after the contract is signed.

Some purchases can be implemented with limited organizational change. The customer buys the product, puts it into use and moves on. Other purchases are different. They require new routines, system integration, employee training, project teams, internal communication, new responsibilities and alignment across functions.

In those cases, the customer is not only choosing a supplier. The customer is trying to get the organization ready to change.

This is where internal alignment becomes a critical bottleneck. When a solution affects several functions, roles and interests, the buyer needs more than a strong business case. They need internal clarity: Why change? Why now? What risks must be managed? Who needs to be involved? What will implementation require? And how do we make sure the organization actually adopts the solution?

In short: the seller's job is no longer only to convince the buyer — it is to help the buyer convince the organization.

What our survey shows

Complex purchases require significantly more internal effort

To understand the internal consequences of different types of purchases, we asked respondents:

“What internal changes or efforts were required to implement the solution?”.

The results show a clear difference between traditional product purchases and highly complex purchases. Traditional product purchases tend to require more limited internal effort. Highly complex purchases, by contrast, often require broader organizational mobilization.

This includes aligning systems and processes, appointing project or steering teams, integrating technologies, communicating with employees, redefining roles and changing ways of working. This shows that B2B buying is not only about supplier selection. In more complex purchases, it is also about organizational readiness.

Internal changes required to implement the solution

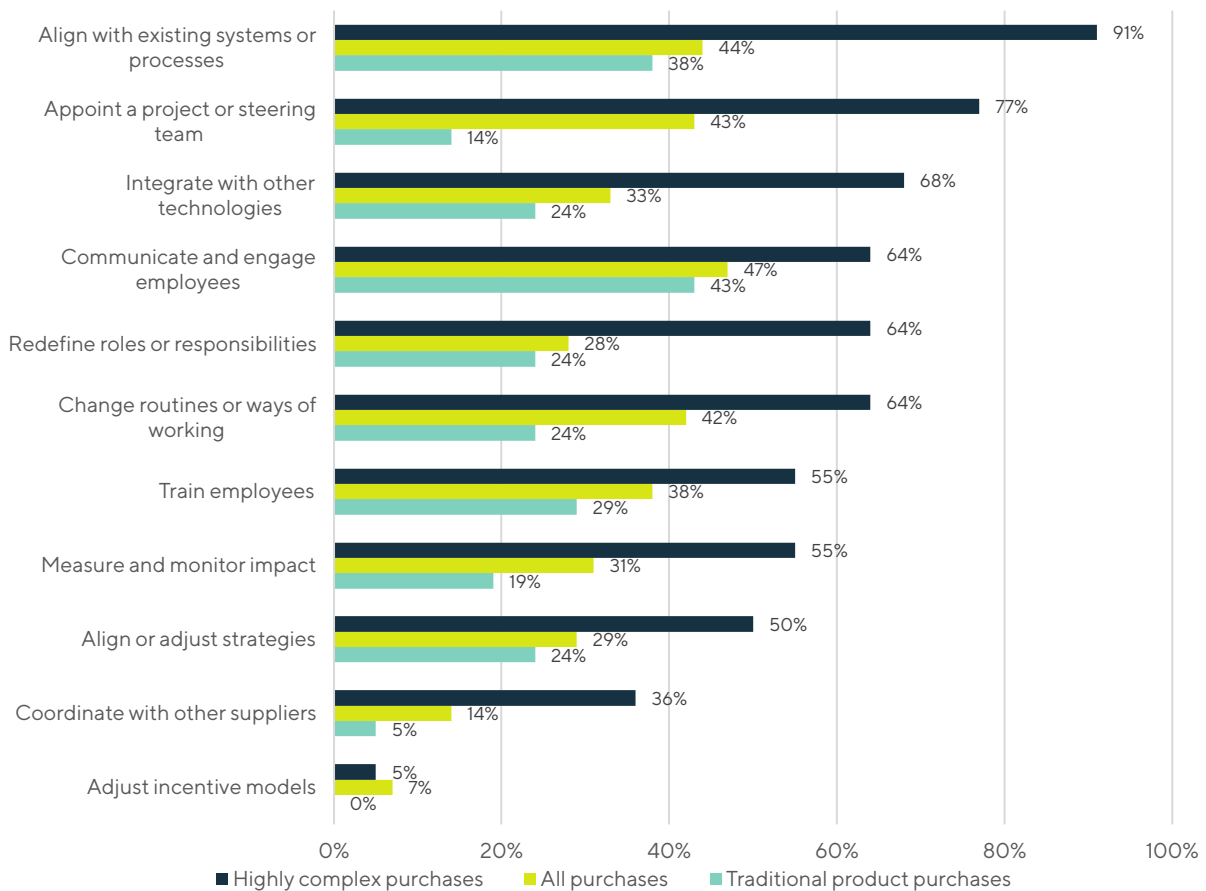


Figure 16: Internal changes required to implement the solution. n=117. Note: Multiple responses allowed.

Highly complex purchases are internal change projects

The difference becomes even clearer when looking at the average number of internal implementation efforts.

Traditional product purchases required an average of 2.4 internal efforts. Customized purchases required 3.8, fully tailored solutions 3.9, while highly complex purchases required 6.3.

This means that highly complex purchases are not just “larger” purchases. They are more organizationally demanding. They

require the customer to coordinate people, systems, processes, responsibilities and change activities before the value of the solution can be realized.

This also explains why complex purchases often take longer and involve more people. The buying process is extended not only because the customer needs to evaluate suppliers, but because the customer needs to prepare the organization for implementation.

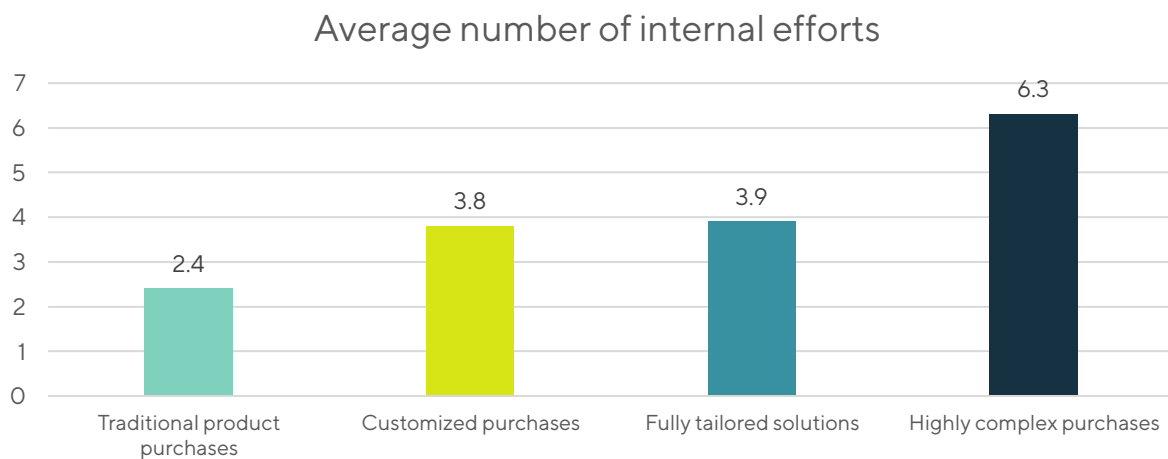


Figure 17: Highly complex purchases require more internal implementation effort. n=112. Note: Average number of internal changes or efforts required.

Change management appears to improve purchase outcomes

The data suggests that implementation success is not only about the solution itself, but also about how the customer manages internal change. Purchases where the organization needed to communicate and engage employees were reported as successful in 96% of cases, compared with 83% when this effort was not selected.

The relationship is close to statistical significance ($p \approx 0.058$) and is commercially meaningful. It suggests that active communication, employee engagement and internal anchoring may contribute to better purchase outcomes — especially when the solution requires people to adopt new ways of working.

At the same time, purchases requiring coordination with other suppliers appear more difficult to make fully successful. When this effort was selected, 69% of purchases were reported as successful, compared with 93% when it was not selected. This points to the added complexity of dependencies, integration risks, unclear responsibilities and multi-supplier coordination.

Internal effort expands the buying network

The number of internal changes required is strongly linked to buying complexity.

Purchases requiring 0–2 internal efforts took an estimated 2.9 months on average. Purchases requiring 5 or more internal efforts took 6.6 months. In other words, the more internal work the solution creates, the longer the decision process becomes.

The same pattern appears in stakeholder involvement.

Purchases requiring 0–2 internal efforts involved an estimated 3.9 people on average, while purchases requiring 5 or more internal efforts involved 6.3 people. Functional involvement also increased: when 5 or more internal efforts were required, almost four functions were involved on average.

As internal change increases, trust becomes more important

The survey also shows that when implementation demands increase, buyers place greater value on specific aspects of the supplier's selling approach.

A clear pattern is the growing importance of trust, credibility and confidence. Among purchases requiring only 0–2 internal efforts, 40% of respondents selected trust as one of the most important aspects of the supplier's approach. Among purchases requiring 5 or more internal efforts, this increased to 78%.

There is also an increase in the importance of the supplier's ability to educate, inspire and challenge the buyer's thinking — from 9% in low-effort purchases to 25% in high-effort purchases.

This suggests that as the customer's internal change burden grows, the seller must do more than explain the solution. The seller must help the customer understand the implications of the change, build confidence in the path forward and support internal sensemaking.

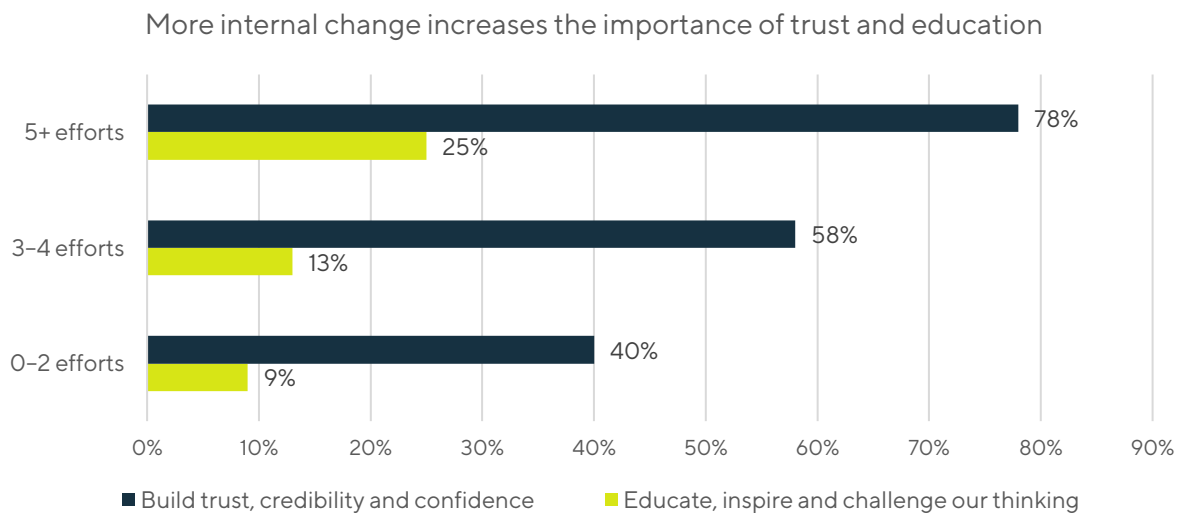


Figure 18: More internal change increases the importance of trust and education. n=117. Note: Share of respondents selecting each supplier approach factor by number of internal implementation efforts required.

What it means: the buyer needs help selling the decision internally

The data shows that complex B2B buying is not only about evaluating suppliers. It is also about preparing the customer organization to implement, adopt and benefit from the decision.

Highly complex purchases require significantly more internal effort than traditional product purchases. Buyers need to align the solution with existing systems and processes, appoint project or steering teams, integrate with other technologies, communicate with employees, redefine roles and responsibilities, train users and change ways of working.

This means that the customer is not only asking: Which supplier should we choose?

They are also asking:

- Can we make this work in our organization?
- Who needs to be involved?
- What will implementation require?
- How much disruption will this create?
- Will people adopt the solution?
- Can we defend the decision internally?

This is why internal alignment becomes a bottleneck. Different stakeholders may agree that change is needed, but disagree on priorities, timing, budget, risk, implementation or expected value. A solution can be attractive on paper but still fail to move forward if the customer cannot create enough internal confidence to act.

In complex B2B buying, the seller's job is therefore no longer only to convince the buyer. It is to help the buyer convince the organization.

Sales implication in brief

Sales teams need to treat internal alignment as part of the sales process, not something the customer manages alone after the decision.

This means helping buyers understand what implementation will require, which stakeholders need to be involved, what risks need to be addressed and what evidence different parts of the organization need in order to support the decision.

Sellers should also become better at equipping internal champions. The champion often needs to explain the problem, defend the business case, answer objections, justify the supplier choice and keep momentum internally — often when the seller is not in the room.

That requires more than product material. It requires stakeholder-specific business cases, executive summaries, implementation roadmaps, risk mitigation material, ROI logic, reference stories and clear narratives that help the customer explain the decision internally.

In brief: Complex deals often stall because the customer is not internally ready to move forward. Sellers that help buyers build alignment, prepare for implementation and create confidence across the organization become more valuable than sellers who only present the solution.



5. AI makes buyers more informed — but not necessarily more confident

The underlying shift: from human-led research to AI-assisted buying

AI is beginning to change how B2B buyers search, structure, compare and prepare for purchasing decisions. It can help buyers discover suppliers, screen alternatives, summarize information, compare options, analyze cost and risk, and prepare requirements.

But in complex B2B buying, AI does not remove the human burden of deciding.

The final decision is still carried by people who must manage risk, build internal confidence and defend the choice inside their organization. A buyer may use AI to gather information, but the organization still needs to trust the supplier, believe in the solution, understand the implementation implications and feel confident that the decision will not create unacceptable downside.

This creates an important paradox.

AI may make buyers more informed, but not necessarily more confident. It may increase the speed and breadth of research, but it does not automatically solve the human and organizational challenges that define complex buying: trust, risk, internal alignment and accountability.

For sales organizations, the message is clear. AI will change how suppliers are found, compared and evaluated. But the basis of trust in complex decisions remains human. Sellers must therefore become visible in AI-assisted research while becoming even stronger at creating confidence in human decision processes.

What our survey shows

AI adoption in B2B buying is still uneven

Across all purchases analyzed, AI played no role in approximately half of the buying processes. In traditional product purchases, the figure is similar. In highly complex purchases, AI is more present, but still absent in a significant share of cases.

This suggests that AI is not yet a universal feature of B2B buying. Despite the rapid growth of generative AI tools, many buying processes remain largely human-led, relationship-based or supported by more traditional forms of research and evaluation.

However, the pattern differs by purchase complexity. In traditional product purchases, AI is more often used for relatively straightforward supplier-market activities: discovering and researching suppliers, screening or shortlisting suppliers, and comparing or scoring alternatives.

In highly complex purchases, AI appears to play a somewhat different role. It is more often used to support analysis, simulate options, generate requirements and prepare the organization for decision-making.

This distinction matters. In simpler purchases, AI may increasingly help buyers find and compare suppliers. In more complex purchases, AI may become more important as a decision-preparation tool — helping buyers structure information, assess alternatives and prepare internal decision material.

Use of AI in B2B purchases

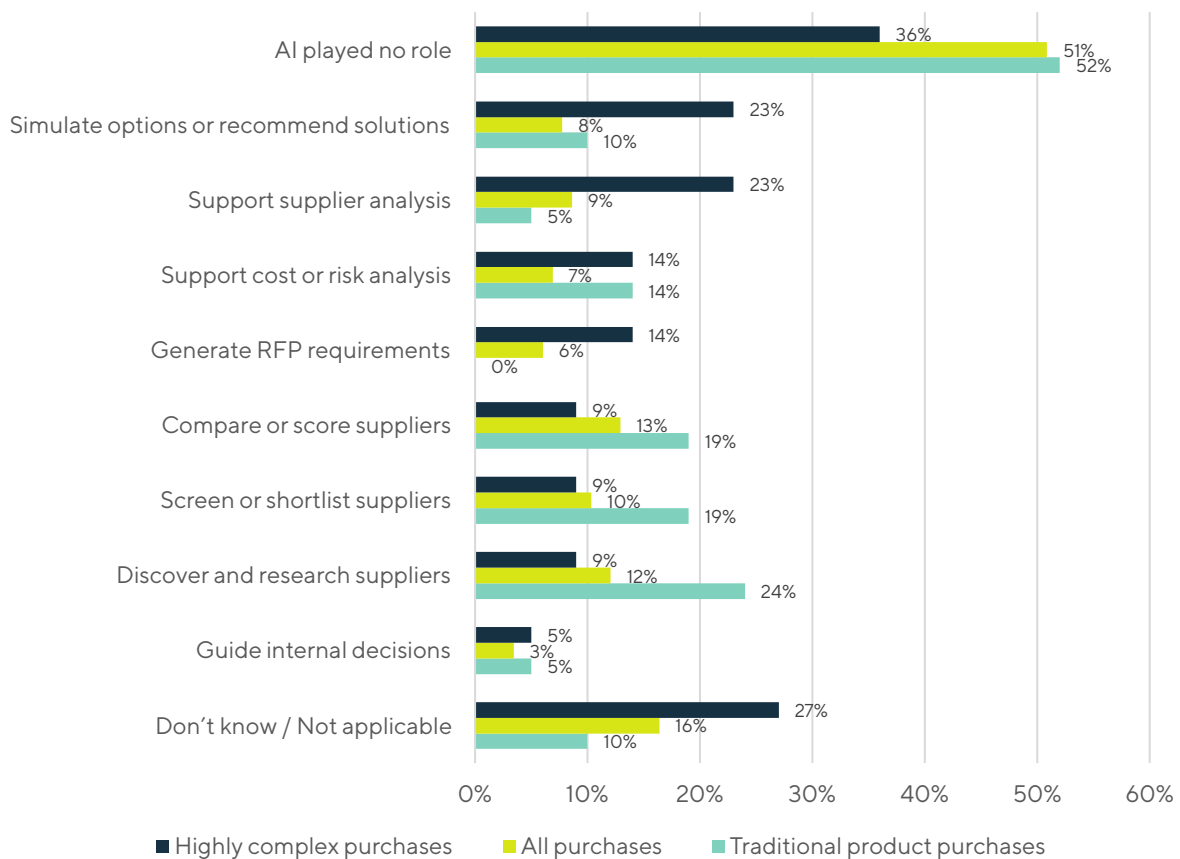


Figure 19: Use of AI in B2B buying processes. n=116. Note: Multiple responses allowed.

AI has limited influence on final supplier decisions today

Although AI is beginning to support parts of the buying process, its direct influence on final supplier decisions remains limited.

Most respondents say AI had no or limited influence on the final supplier decision. This is important. AI may support research, analysis and preparation, but the final decision still depends on human judgment, trust and accountability.

In other words, AI can help buyers become better prepared. But it does not yet appear to replace the human and organizational confidence required to choose a supplier, justify the decision and move forward.

This is especially important in complex purchases. The more consequences a decision carries, the more the organization needs to trust not only the information, but also the supplier's ability to deliver, implement and support the solution.

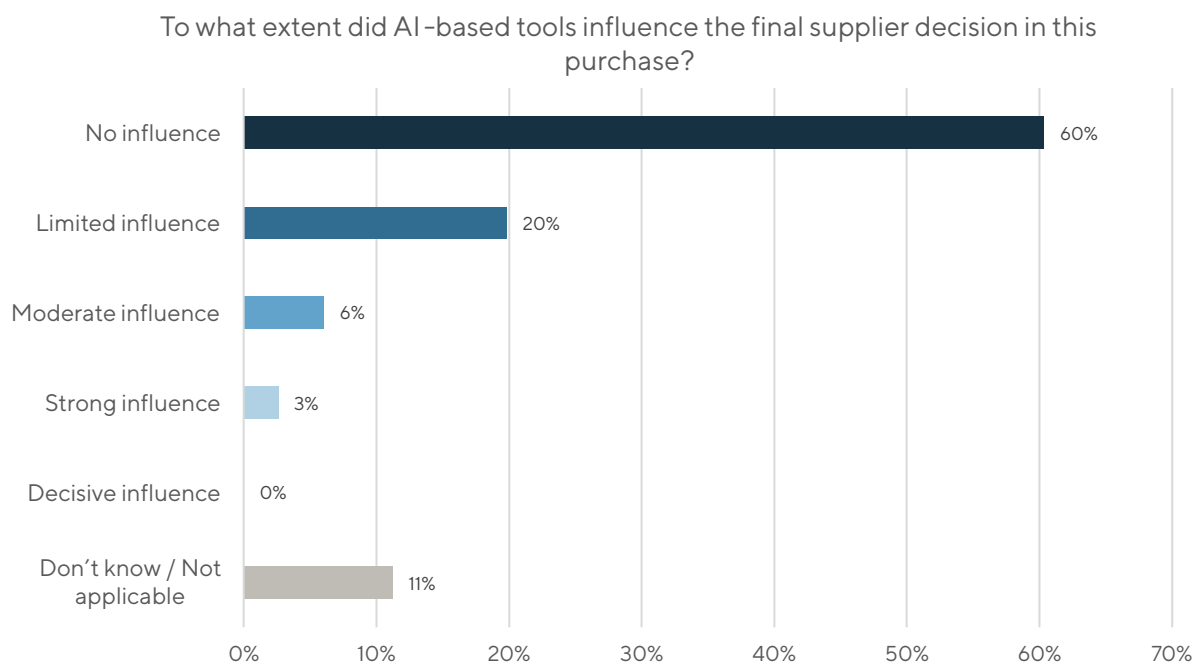


Figure 20: Influence of AI-based tools on the final supplier decision. n=116.

Buyers expect agentic AI to become more influential

While current adoption is still uneven, expectations for the future are significant. Looking ahead over the next two to three years, 66% of respondents expect agentic AI to influence their organization's B2B purchasing processes to a large or some extent. Only 6% expect no influence at all.

This suggests that buyers see AI's role in purchasing as likely to expand. Today, AI is mainly used as a support tool. In the next phase, agentic AI may increasingly act as an intermediary between buyers and suppliers: searching for suppliers, interpreting product data, checking certifications, comparing alternatives, analyzing risk, preparing shortlists and triggering procurement workflows.

External forecasts point in the same direction, although they should be interpreted as projections rather than established facts. Gartner has predicted that by 2028, 90% of B2B buying will be AI-agent intermediated, pushing more than \$15 trillion of B2B spend through AI agent exchanges.³ Gartner also argues

that traditional SEO and paid search will give way to "agent engine optimization", where products, supplier data and trust signals need to be machine-readable.

This forecast may prove aggressive, and adoption will likely vary by industry, category, purchase type and regulatory environment. Gartner has also warned that many agentic AI projects remain immature and that a large share may be scrapped due to cost, unclear business value and overhyped vendor claims.

The balanced conclusion is therefore not that AI agents will replace human buying decisions overnight. Rather, the direction of travel is clear: AI will increasingly shape what buyers see, how they compare suppliers and which options appear credible before humans engage deeply.

For suppliers, that shift is significant. If AI tools cannot find, read, interpret or trust a supplier's information, that supplier may be excluded before a human buyer ever evaluates it.

3 Gartner (Nov 2025): "Strategic Predictions for 2026: How AI's Underestimated Influence Is Reshaping Business"

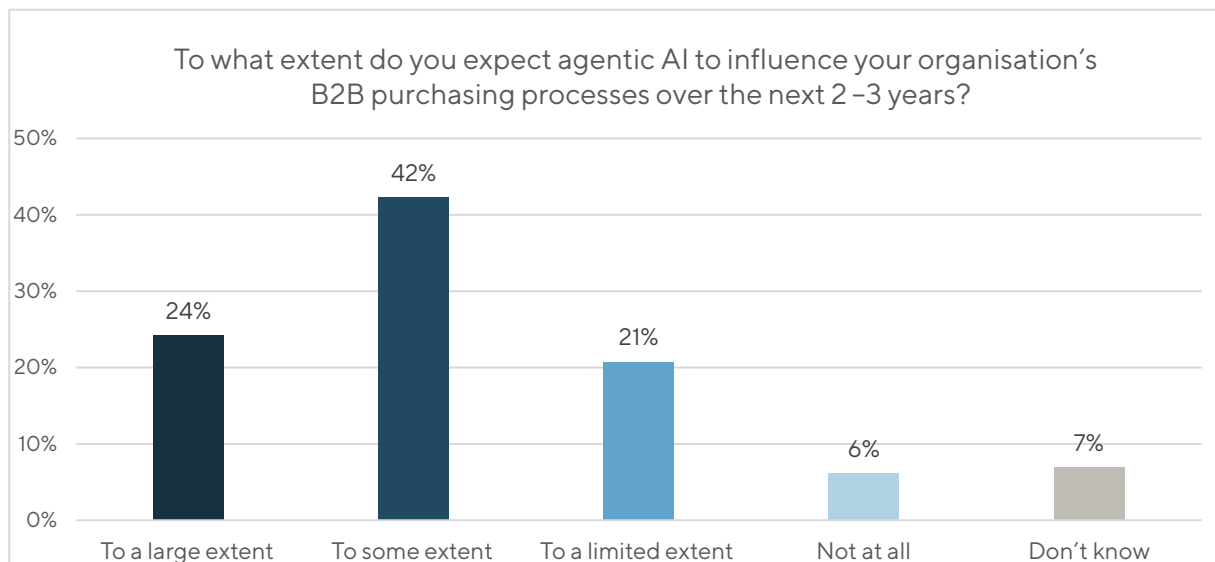


Figure 21: Expected influence of agentic AI on B2B buying over the next 2-3 years. n=116.

What it means: AI raises the information level, but trust still decides

The data suggests that AI will change the front end of B2B buying before it changes the final decision.

Buyers will increasingly use AI to search, summarize, compare, analyze and prepare. Agentic AI may go further by autonomously gathering supplier information, screening alternatives, checking requirements, comparing offers and preparing procurement workflows.

This means that the supplier's first audience may no longer be a human buyer. It may be an AI-assisted search process, an internal procurement tool or a buyer-side agent acting on behalf of the organization.

That has major implications. Suppliers must be understandable not only to people, but also to machines. Product information, use cases, pricing logic, implementation evidence, security documentation, certifications, references, sustainability data, FAQs and comparison material need to be structured, specific, credible and easy to retrieve.

In the past, SEO helped suppliers become visible in search engines. In the next phase, suppliers also need to think about AI visibility: whether generative AI tools, procurement agents and AI-assisted research systems can find, interpret and trust their information.

This is sometimes described as Generative Engine Optimization or AI search optimization. But the underlying principle is simple: if buyer-side AI tools cannot access relevant, reliable and well-structured supplier information, the supplier may never enter the buyer's consideration set.

At the same time, AI visibility will not be enough. In complex decisions, buyers still need human confidence. AI may help narrow the field, but people still need to trust the supplier, understand the risks, align stakeholders and believe the implementation can succeed.

The future of B2B buying may therefore split into two layers:

- 1. The machine layer:** where suppliers are found, filtered, compared and validated through data, content, AI tools and procurement systems.
- 2. The human layer:** where trust, risk, internal alignment and decision confidence are created.

Winning suppliers will need to perform well in both.

Sales implication in brief

Sales and marketing organizations need to prepare for AI-assisted and agent-mediated buying.

First, suppliers must make their information AI-readable and decision-ready. This means investing in clear positioning, structured product and service data, industry-specific use cases, implementation proof, security and compliance documentation, reference stories, ROI logic, FAQs and content that answers the questions buyers and AI tools are likely to ask.

Second, marketing must expand from traditional SEO to AI visibility. The goal is not only to rank in search engines, but to be understood, cited and recommended by AI-assisted research tools. Supplier information needs to be consistent across websites, knowledge bases, product pages, analyst profiles, marketplaces, partner ecosystems and customer proof points.

Third, sales teams must assume that buyers may arrive more informed than before. If AI has already helped the buyer compare alternatives, summarize content and prepare questions, the seller's role cannot be to repeat generic information. Sellers need to bring interpretation, insight, risk reduction and confidence.

Fourth, sales organizations need to use AI themselves. Sellers should use AI to improve account research, stakeholder hypotheses, meeting preparation, content personalization, risk identification and internal decision support.

Finally, sales and marketing need to work together more closely. In an AI-assisted buying environment, the boundary between marketing content, sales enablement and buyer decision support becomes less clear. The same evidence that helps a human buyer understand the supplier may also help an AI tool include the supplier in the shortlist.

In brief: AI will raise the standard for information quality. Human sales will need to raise the standard for insight, trust and decision support. In the age of agentic AI, suppliers must be easy to find, easy to understand, easy to validate – and still credible enough for humans to trust.



6. Buyers value sellers who help them make progress

The underlying shift: from product presentation to decision support

B2B buyers do not need more product presentations. They need help making better decisions.

As buying processes become more complex, the seller's role changes. Buyers are not only asking whether the product or service is good. They are asking whether the solution fits their specific situation, whether the supplier understands their business, whether implementation will work, whether internal stakeholders will support the decision, and whether the expected value can actually be realized.

This means that the most valuable sales interactions are not necessarily those that explain the solution in more detail. They are the interactions that help buyers clarify what matters, compare alternatives, reduce uncertainty, build internal confidence and move the decision forward.

The underlying shift is therefore clear: in complex B2B buying, buyers want less pitching and more decision support.

What our survey shows

Fit, reliability and supplier credibility matter more in complex purchases

The data shows that "fit with our needs" is the most important buying criterion in highly complex purchases. It was selected by 82% of respondents, compared with 62% in traditional product purchases.

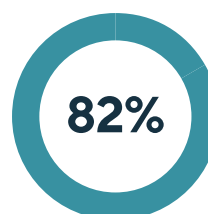
This is an important difference. It suggests that complex purchases are not won by generic value propositions. They are won when buyers believe that the supplier understands their specific context and can adapt the solution to their needs, priorities, constraints and risks.

Product or service quality remains important, but its relative role changes. In traditional product purchases, quality is the highest-ranked criterion, selected by 81% of respondents. In highly complex purchases, it is selected by 64%. This does not mean quality becomes unimportant. Rather, it suggests that quality alone is not enough to differentiate when the purchase is complex. Buyers also need relevance, reliability, credibility and confidence in execution.

Several criteria become more important in complex purchases than in traditional product purchases. Delivery reliability is selected by 50% of respondents, compared with 29% in traditional product purchases. Proven references or track record are selected by 32% compared with 14%. Supplier reputation or brand is selected by 32% compared with 19%. Service responsiveness is selected by 32% compared with 14%.

Taken together, these results show that complex buyers are not only evaluating the solution. They are evaluating the supplier's ability to deliver, support, adapt and reduce risk.

The conclusion is clear: in complex B2B purchases, buyers choose on fit and confidence, not just product quality and price. The more complex the purchase, the more important it becomes for the supplier to demonstrate relevance, credibility and execution capability.



Of respondents say "fit with our needs" is the most important buying criterion in highly complex purchases.

Most important buying criteria when selecting the supplier

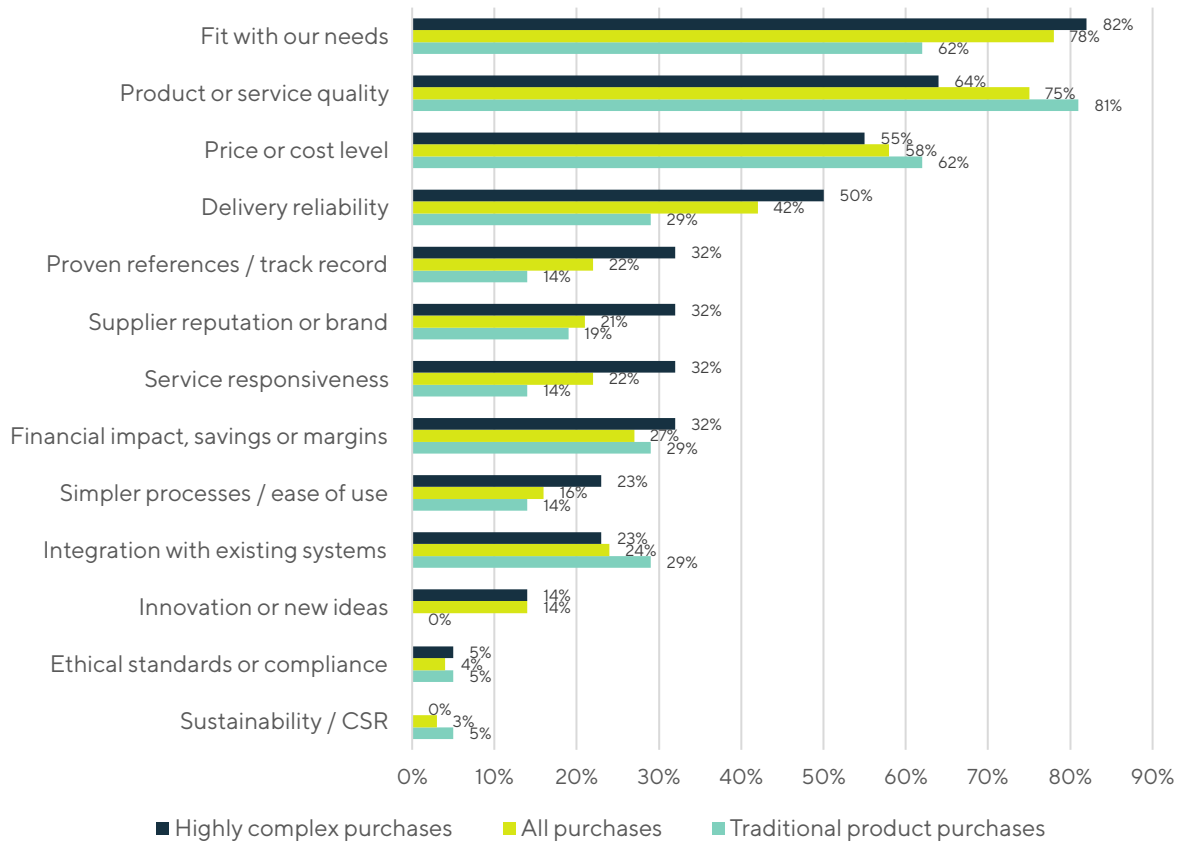


Figure 22: Most important buying criteria when selecting the supplier. n=116. Note: Respondents could select up to five criteria.

Critical insight

Quality and fit beat price

Price matters. But it is not what buyers rank first.

In complex purchases, 82% select fit with needs as a top buying criterion, 64% select product or service quality and 55% select price.

Discounting solves the criterion buyers rank below fit and quality.

Implication: Compete on relevance, proof and confidence – not only on price.

Tailoring the solution is the most important selling approach

Overall, tailoring the solution to the customer's specific needs is the most important selling approach. This is where the seller can create real value. When comparing traditional product purchases with highly complex purchases, the pattern is clear: in complex deals, the winning supplier's approach is less about explaining the offer and more about creating confidence.

Two factors dominate in complex purchases: tailoring the solution to the customer's specific needs and building trust, credibility and confidence, both selected by 73% of respondents. Compared with traditional product purchases, trust increases by 25 percentage points.

This supports one of the core messages of the report: as buying complexity increases, the seller's role shifts from product presenter to confidence builder. Buyers need to believe not only that the solution is relevant, but that the supplier can help them manage uncertainty, implementation and internal alignment.

Interestingly, explaining and calculating value is more prominent in traditional product purchases than in highly

complex purchases. This does not mean value is unimportant in complex sales. Rather, it suggests that in complex purchases, value calculation alone is not enough. Buyers also need trust, relevance, guidance and confidence in execution.

One result deserves particular attention. "Helping navigate internal decision complexity" and "mobilizing stakeholders and building consensus" rank very low, at 5% and 3% respectively. At first glance, this may seem surprising given the earlier findings that complex purchases involve more stakeholders, more functions and more risk.

There are two possible interpretations. One is that buyers do not explicitly see consensus-building as something they expect from suppliers. Another is that buyers may need this support without labeling it as such. They may value the seller's ability to tailor the solution, build trust and understand the business — all of which are indirect ways of helping the customer navigate internal complexity.

This creates an important paradox: buyers may not ask sellers to facilitate the decision process, but the data suggests that complex buying increasingly requires exactly that capability.

Most important aspects of the supplier's selling approach

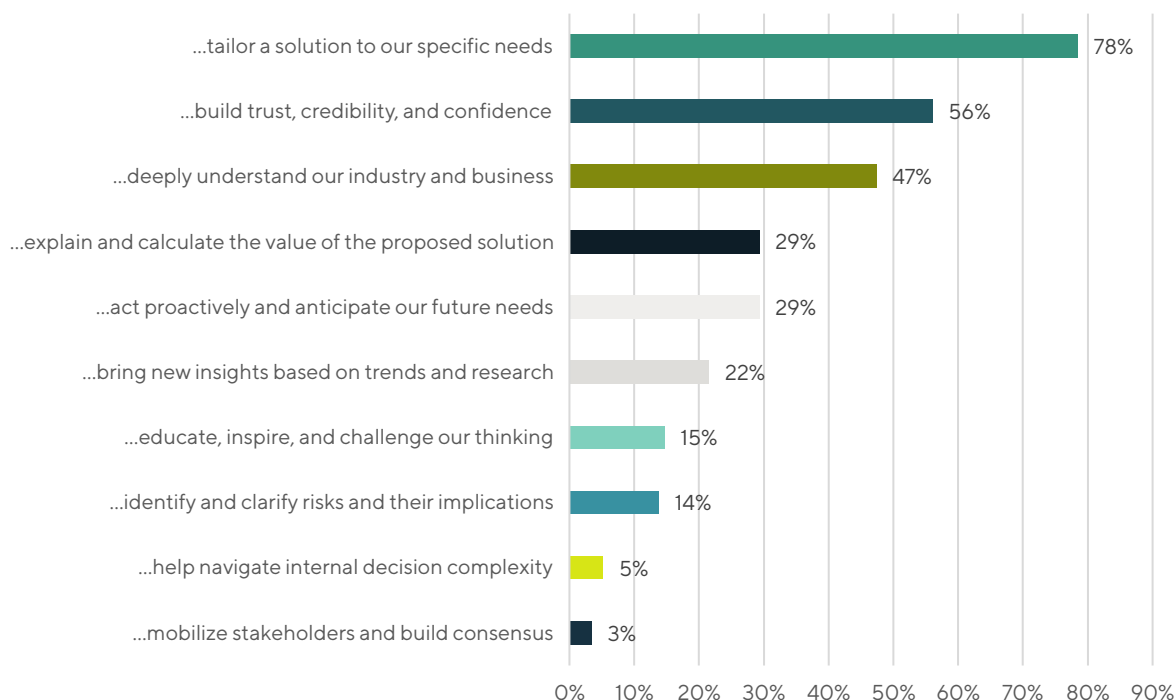


Figure 23: Most important aspects of the supplier's selling approach. n=116. Note: Respondents could select up to three options.

Sellers often fail where buyers need them most

The survey also reveals a clear gap between what buyers value and what they often experience in sales interactions.

When asked which behaviors they often experience when interacting with salespeople, 53% say sellers do not listen carefully to their needs. 49% say sellers fail to demonstrate clear business value. 42% say sellers dominate the conversation instead of listening. 33% say sellers come poorly prepared to meetings. 24% say sellers cannot explain their solution clearly, and 22% say sellers ask irrelevant or insufficient questions about the buyer’s business.

These are not minor irritations. They directly undermine the capabilities buyers say they value most: tailoring, trust, credibility and business understanding.

The most damaging pattern is that many negative behaviors are rooted in insufficient customer understanding. Poor listening, weak business value, irrelevant questions and generic conversation all suggest that too many sellers still approach buyers with a supplier-centered mindset.

This matters because complex buyers do not want to be “sold to” in a generic way. They want help making sense of a decision that may affect their organization, their stakeholders and their own accountability. When sellers fail to listen or demonstrate value, they do not just create a poor meeting experience. They reduce the buyer’s confidence in the supplier.

Seller behavior buyers often experience

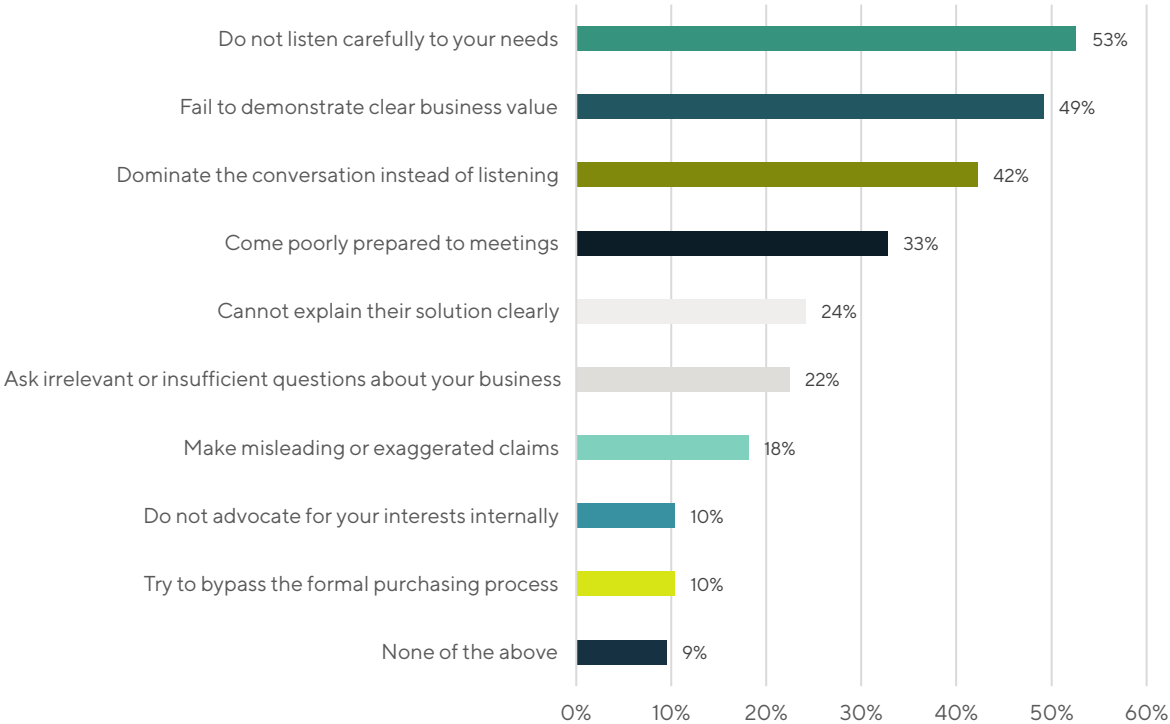


Figure 24: Seller behaviors buyers often experience. n=116. Note: Multiple responses allowed.

Critical insight

Sellers talk too much, listen too little and struggle to quantify value

The most common seller failures are not about product knowledge. They are about customer understanding and business impact.

53% of buyers say sellers do not listen carefully to their needs, 42% say sellers dominate the conversation instead of listening, and 49% say sellers fail to demonstrate clear business value.

Features get explained. Business impact often does not.

In complex B2B buying, sellers need to quantify what changes: which costs fall, which risks decrease, which processes speed up, which KPIs improve and which business outcomes the customer can expect.

If the buyer cannot explain the value internally, the seller has not made it clear enough.

Buyers have mixed feelings about proactive sales outreach

The data also shows that buyers are not universally negative toward salespeople who reach out proactively. In fact, 54% have a positive view: 13% say they are very positive because salespeople provide valuable insights, and 41% are somewhat positive because they sometimes add value.

At the same time, 42% have a negative view: 33% say salespeople rarely add value, and 9% see them mostly as a distraction.

This is an important nuance. The problem is not that buyers dislike salespeople. The problem is that too many sales interactions fail to help buyers make progress.

Proactive outreach still has a role — but only when it is relevant, informed and connected to the buyer's priorities. In B2B buying, the issue is not outreach itself. It is outreach that does not create value, insight or decision progress.

Buyers are open to sellers who bring insight, relevance and business understanding. But they are much less tolerant of sellers who reach out without a clear reason, without preparation or without understanding the buyer's situation.

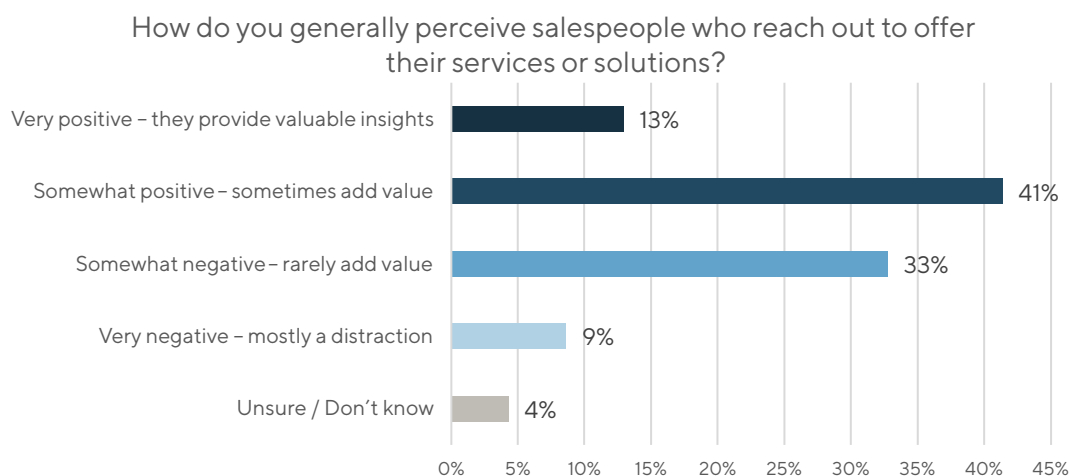


Figure 25: Buyer perception of salespeople who reach out proactively. n=116.

Buyers value business understanding and proactive support in ongoing relationships

When asked what types of support they value most from suppliers in an ongoing business relationship, buyers place business understanding at the top. 68% say they value suppliers who understand their business and priorities.

Several other forms of support also rank highly: responsiveness and ease of collaboration (60%); bringing new ideas and innovation (60%); and proactive advice and recommendations (59%).

These results reinforce the overall pattern. Buyers value suppliers who do more than deliver the contracted product or service. They value suppliers who understand their business, collaborate effectively, bring ideas and provide proactive guidance.

Interestingly, some activities that are often discussed in complex selling — such as supporting implementation and follow-up, measuring business impact, coordinating supplier resources and supporting internal adoption or change — rank lower. This does not necessarily mean they are unimportant. It may indicate that buyers see them as hygiene factors, or that they are less top-of-mind when asked generally about ongoing supplier support.

However, taken together with the risk findings, these lower-ranked items may also reveal an opportunity. If implementation, adoption and business impact are major sources of risk, suppliers may be able to differentiate by making these capabilities more visible and relevant.

The conclusion is simple: make it relevant. Buyers may not value generic support or thought leadership in itself — but they do value anything that helps them reduce risk, create impact and move the decision forward.

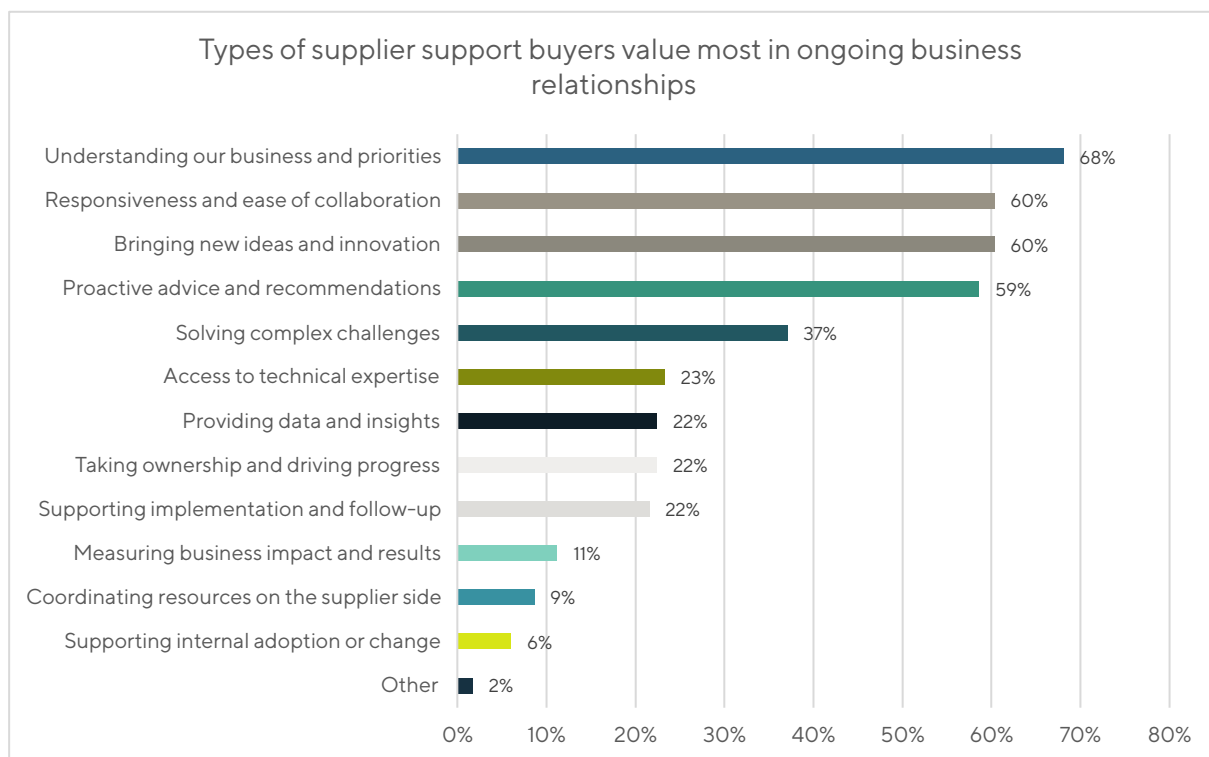


Figure 26: Supplier support buyers value most in ongoing business relationships. n=116. Note: Respondents could select up to five options.

Critical insight

Buyers expect business understanding — and ideas that create value

The most valued supplier capability is understanding the customer's business. 68% of buyers value suppliers who understand their business and priorities.

Buyers also want suppliers who bring new thinking: 60% value new ideas and innovation, and 59% value proactive advice and recommendations.

But ideas alone are not enough. In complex purchases, only 14% select innovation or new ideas as a top buying criterion.

The buyer's real question is: What is your concrete contribution to our goals?

Insight without business relevance is noise. Insight connected to value, risk or impact becomes sales advantage.

What it means: the best sellers help buyers move the decision forward

The data shows that buyers do not simply want more supplier information. They want sellers who help them make progress in a complex decision.

In complex purchases, buyers value suppliers who tailor the solution, build trust and credibility, understand the customer's situation, bring relevant insight and help clarify the decision. This is different from traditional product selling, where the seller's role is often centered on presenting the offer, explaining features and responding to stated requirements.

The challenge is that many buyers already have access to information. They can research suppliers, compare alternatives, read cases, use AI tools and collect internal input before speaking to sales. What they need from the seller is not more generic content, but help interpreting what matters.

This shifts the seller's role from pitching to enabling progress. The seller must help the buyer clarify the problem, understand trade-offs, reduce uncertainty, involve the right stakeholders and build confidence in the decision.

In complex B2B buying, good selling is not measured only by how well the seller presents the solution. It is measured by whether the customer becomes more able to decide.

Sales implication in brief

Sales teams need to move from product-centered conversations to decision-centered conversations.

This means sellers must ask better questions, diagnose the customer's real problem, tailor the value story, address risks and provide evidence that helps different stakeholders move forward.

For sales leaders, this has direct implications for training, coaching and performance management. Sellers should not only be coached on how to present, handle objections and close. They should be coached on how to create decision progress.

That includes:

- Problem diagnosis
- Stakeholder understanding
- Customer KPI alignment
- Business impact logic
- Tangible value evidence
- Risk reduction
- Internal alignment
- Champion enablement
- Implementation confidence

In brief: Buyers do not need sellers who simply explain the solution. They need sellers who help them make sense of the decision, reduce uncertainty and create confidence to act.



The decision enablement model: How to win complex B2B deals

From managing the sales process to enabling the customer's decision process

The findings in this report point to one overarching conclusion: complex B2B sales are no longer won only by communicating value, presenting solutions or progressing opportunities through the seller's own sales process.

In complex buying, the customer is not simply choosing between suppliers. The customer is trying to make a decision that can survive internal scrutiny, manage risk, align stakeholders and succeed in implementation.

This changes the role of the seller

The most valuable seller is not the one who only explains the solution well. It is the one who helps the customer move from uncertainty to confidence — by clarifying the problem, mapping the real decision network, reducing perceived risk, building internal alignment and creating confidence to act.

That is the logic behind the Decision enablement model.

Decision enablement is not one sales technique. It is a set of capabilities that help the customer make progress in their own buying process.

The five capabilities of decision enablement

Decision enablement consists of five capabilities. Together, they describe how sellers help customers move from uncertainty to confidence in complex B2B buying.

Capability	From	To
1. Clarify the problem	Responding to stated needs	Shaping how the customer understands the problem
2. Map the decision network	Managing the main buyer relationship	Orchestrating the full decision network
3. Reduce perceived risk	Presenting value and benefits	Making the decision feel safe to make
4. Build internal alignment	Handling objections one by one	Reducing internal decision friction
5. Create decision confidence	Closing the deal	Helping the customer commit with confidence

1. Clarify the problem

Complex buying often begins before the customer has fully defined what needs to be solved. Buyers may recognize symptoms — inefficiency, rising costs, dissatisfaction, operational pressure or strategic change — but still lack a shared understanding of the underlying issue.

The decision-enabling seller helps the customer move from symptoms to diagnosis.

This means asking better questions, challenging assumptions, bringing external perspective and connecting the customer's current situation to broader business impact. The seller helps the customer understand not only what they may need to buy, but why the problem matters, what is at stake and what a successful decision should achieve.

This is especially important early in the buying journey, before evaluation criteria and shortlists are fully formed. Sellers who help clarify the problem can influence how the customer defines value, risk and success.

Seller shift: From responding to stated needs to shaping how the customer understands the problem.

2. Map the decision network

Complex B2B purchases are rarely decided by one person. They involve multiple stakeholders, functions and levels of authority — each with different priorities, risks and definitions of value.

The decision-enabling seller looks beyond the formal buyer contact and maps the real decision network.

This includes users, influencers, blockers, approvers, risk owners, procurement, finance, IT, operations, executive sponsors and internal champions. The key question is not only who signs the decision but who shapes whether the organization becomes confident enough to move forward.

Each stakeholder may evaluate the decision through a different lens. Finance may focus on cost, ROI and budget exposure. IT may focus on integration, security and technical feasibility. Procurement may focus on commercial terms and supplier

risk. Operations may focus on implementation and disruption. Executives may focus on strategic relevance and reputational consequences.

The seller's task is therefore not only to manage relationships. It is to understand how the decision will actually be made — and what each part of the decision network needs in order to support it.

Seller shift: From managing the main buyer relationship to orchestrating the full decision network and addressing each stakeholder's specific value expectations.

3. Reduce perceived risk

In complex buying, value creates interest — but risk creates hesitation.

Buyers may understand the upside of a solution and still delay the decision because the perceived downside feels too high. Implementation may take longer than expected. Employees may resist adoption. Productivity may drop during transition. Security, compliance or reputational risks may need to be reviewed. The supplier may be seen as credible in one area, but unproven in another.

The decision-enabling seller makes risk visible, manageable and acceptable.

This requires more than reassurance. Different risks require different forms of evidence. Implementation risk requires a credible roadmap, milestones and governance. Adoption risk requires training, change support and user engagement. Financial risk requires a robust business case. Security risk requires validation and documentation. Supplier risk requires references, proof of delivery and transparency.

The goal is not to claim that the purchase is risk-free. That would reduce credibility. The goal is to show that the risks are understood, actively managed and possible to control.

In complex B2B sales, the seller who leads the risk conversation often becomes more trusted than the seller who avoids it.

Seller shift: From presenting value and benefits to making the decision feel safe to make.

4. Build internal alignment

Complex purchases often stall not because no one sees value, but because different stakeholders see different value, different risks or different priorities.

The customer may agree that change is needed, but still struggle to align around timing, budget, requirements, implementation, ownership or expected outcomes. In these situations, the buyer's challenge is not only to select a supplier. It is to get the organization ready to move.

The decision-enabling seller helps reduce this internal decision friction.

This can include helping internal champions explain the problem, providing stakeholder-specific material, clarifying trade-offs, facilitating workshops, aligning technical and commercial perspectives, and making the decision easier to communicate internally.

The seller should not take over the customer's internal decision process. But the seller can equip the customer to move through it more effectively.

This is where champion enablement becomes critical. A strong champion is not only someone who likes the supplier. A strong champion is someone who can explain the decision, defend it internally, answer objections and keep momentum when the seller is not in the room.

Seller shift: From handling objections one by one to reducing internal decision friction.

5. Create decision confidence

The final barrier in complex B2B buying is often not lack of interest. It is lack of confidence.

Buyers may understand the problem, see the value, prefer the supplier and still hesitate because the consequences of being wrong feel too high. The organization may ask: Are we solving the right problem? Can we trust this supplier? Will this work in our business? Can we implement it? Can we defend the decision if challenged?

The decision-enabling seller helps the customer move from uncertainty to commitment. Decision confidence is created when the customer believes three things:

1. The problem is worth solving. The buyer must understand why the issue matters, what business impact is at stake and why action is needed now.

2. The selected solution is credible. Credibility means more than a strong value proposition. The value must be tangible, relevant to the customer's priorities and proven through evidence the customer trusts — such as references, implementation proof, business-case logic and KPIs that show how success will be measured.

3. The organization can implement it successfully. The buyer must believe that the organization has the capacity, alignment, resources and support needed to turn the decision into real impact.

When these conditions are met, the decision becomes easier to make — and easier to defend internally.

This is why closing the deal is no longer only about urgency, persuasion or commercial negotiation. In complex buying, the seller must help the customer reach a point where the decision feels clear, justified and safe enough to act on.

Seller shift: From closing the deal to helping the customer commit with confidence.

What it means: decision enablement is the new logic of complex sales

The shift is not from selling products to selling solutions. That shift has been discussed for decades. The more important shift is from managing the seller's sales process to enabling the customer's decision process.

In a world of larger buying networks, earlier shortlists, higher perceived risk, more internal implementation effort and AI-assisted research, the seller's value is no longer only in providing information or presenting a strong solution. The seller's value is in helping the customer make progress.

Decision enablement means helping the customer clarify what matters, involve the right people, reduce uncertainty, align internally and build enough confidence to move forward.

The future of complex sales belongs to sellers who make the decision easier, safer and more compelling for the customer to make. That is the essence of decision enablement.

What sales leaders must do differently

The leadership agenda: build the organization around how customers buy

The findings in this report point to a clear leadership challenge: sales organizations cannot win complex B2B deals by improving sales activity alone.

More calls, more meetings, more proposals and more pipeline reviews may create movement, but not necessarily customer progress. In complex buying, progress happens when the customer becomes better able to decide.

Sales leaders therefore need to build organizations that do not only manage the sales process, but actively enable the customer's buying process.

This requires a shift in how sales is trained, coached, measured and led.

1. Manage customer decision progress, not only sales activity

Most sales organizations track what sellers do: meetings, proposals, next steps, pipeline stage and forecast probability. These are useful, but they do not always show whether the customer is actually moving closer to a decision.

In complex buying, sales leaders need to ask a different set of questions:

- Has the customer clarified the problem?
- Who is involved in the decision network?
- Which risks are slowing the decision?
- Is there internal alignment?
- Is the champion equipped to build support internally?
- What must happen for the customer to feel confident enough to act?

What sales leaders must do differently:

Redesign pipeline reviews around customer decision progress, not only seller activity.

2. Coach sellers to reduce risk, not only communicate value

Many sellers are trained to explain benefits, build business cases and handle objections. In complex buying, that is not enough.

Buyers are not only evaluating upside. They are also protecting themselves from downside. Implementation risk, adoption risk, financial risk, security risk, compliance risk and supplier risk can all slow the decision.

Sales leaders should therefore make risk reduction a core sales capability. Sellers need to identify perceived risks early, understand who owns them inside the customer organization and address them with the right evidence.

A deal should not be considered advanced only because a proposal has been sent. It should be considered advanced when the customer's main risks have been identified, discussed and reduced.

What sales leaders must do differently:

Train sellers to ask risk questions early, identify who owns each risk and provide the right evidence to make the decision feel safer.

3. Make stakeholder mapping a non-negotiable discipline

Complex B2B decisions are made by networks, not individuals. Yet many sales teams still manage deals through one or two visible contacts. That is increasingly dangerous.

Sales leaders should make stakeholder mapping a mandatory part of complex deal management.

This means identifying not only names and titles, but roles in the decision:

- Who sponsors the change?
- Who owns the business case?
- Who carries implementation responsibility?
- Who controls budget?
- Who evaluates risk?
- Who can block the decision?
- Who must live with the solution after purchase?
- Who needs to be convinced, reassured or equipped?

The goal is not to create a static account map. The goal is to understand the decision network well enough to help the customer align it.

What sales leaders must do differently:

Make stakeholder coverage and decision-network quality visible in CRM, account plans and deal reviews.

4. Equip champions to sell the decision internally

Many complex deals are won or lost when the seller is not in the room.

The customer's internal champion may need to explain the problem, defend the business case, answer objections, justify the supplier choice and keep momentum across the organization.

Sales organizations should therefore become better at champion enablement. This includes executive summaries, stakeholder-specific business cases, risk mitigation material, implementation roadmaps, ROI logic, reference stories and clear narratives that help the customer explain the decision internally.

A strong champion is not only someone who likes the supplier. A strong champion is someone who is equipped to move the decision forward.

What sales leaders must do differently:

Create standard champion-enablement tools: executive summaries, stakeholder-specific business cases, risk material, implementation roadmaps and internal presentation support.

5. Build trust before the customer enters the market

The report shows that buyers often form supplier preferences before the formal process begins. Existing relationships, reputation, references, networks and prior experience strongly influence which suppliers are considered.

This means sales and marketing cannot wait until the customer issues an RFP or formally enters the market. By then, the shortlist may already be largely formed.

Sales leaders should therefore work with marketing, customer success and senior leadership to build trust before active demand is visible. This includes thought leadership, customer proof, industry credibility, executive presence, account-based marketing and strong ongoing customer relationships.

The goal is not only lead generation. It is shortlist creation.

What sales leaders must do differently:

Shift part of sales and marketing effort upstream: thought leadership, references, executive relationships, customer proof, account-based marketing and proactive engagement around business triggers.

6. Make implementation confidence part of the sales methodology

Customers are not only evaluating the solution. They are evaluating whether their organization can implement it successfully.

Sales teams should therefore sell the implementation, not only the offer. They need to show what happens after the decision: roadmap, roles, responsibilities, timeline, governance, risks and success factors.

Implementation confidence should be built before the contract is signed.

For complex deals, this means involving the right expertise earlier: technical experts, implementation specialists, customer success roles and senior sponsors. The salesperson alone may not be enough to create confidence across the full decision network.

What sales leaders must do differently:

Add implementation confidence to the sales methodology and involve technical experts, customer success, implementation specialists and senior sponsors earlier in complex deals.

7. Prepare for AI-assisted buyer research

AI will make buyers more informed, but not necessarily more confident.

Sales and marketing leaders need to ensure that supplier information is easy to find, understand and validate — by both human buyers and AI-supported research tools. This requires a stronger focus on GAIO — Generative AI Optimization: making sure that the company's expertise, proof points, references, product data, implementation evidence, security documentation, FAQs and case studies are structured, specific, credible and easy for AI tools to interpret.

In other words, suppliers must not only optimize for search engines, but also for the generative AI tools buyers increasingly use to research, compare and prepare decisions.

At the same time, sellers need to use AI to improve their own preparation: account research, industry analysis, stakeholder hypotheses, meeting preparation, content personalization and risk identification.

AI raises the standard for information quality. Human sales must raise the standard for insight, trust and decision support.

What sales leaders must do differently:

Work with marketing to structure credible proof points for AI-assisted research and GAIO — and train sellers to use AI for better preparation, sharper insights and stronger decision support, not generic automation.

8. Redefine what good selling looks like

If buying has changed, sales performance management must change with it.

Good selling should not only be defined by activity, pipeline volume, forecast accuracy or the ability to present the solution. It should also be defined by whether the seller helps the customer make progress.

Sales leaders should therefore add new indicators of decision enablement, such as:

- Quality of problem diagnosis
- Stakeholder coverage
- Understanding of decision criteria
- Identification of perceived risks
- Evidence used to reduce risk
- Level of internal customer alignment
- Strength of champion enablement
- Confidence in implementation

What sales leaders must do differently:

Add decision-enablement indicators to sales management: problem diagnosis, stakeholder coverage, risk reduction, champion enablement, internal alignment and implementation confidence.

Implication in brief

Sales leaders must stop managing only what sellers do and start managing how customers decide.

The next frontier of sales effectiveness is not more activity, better presentations or harder closing. It is the ability to build a sales organization that clarifies customer problems, maps decision networks, reduces perceived risk, builds internal alignment and creates decision confidence.

That is what it means to build a decision-enabling sales organization.



Appendix: Additional survey information and supporting analyses

This appendix includes selected survey information, definitions and additional results that provide context for the findings in the main report.

To avoid repetition, figures and analyses already presented in the main report are not repeated here.

Survey questionnaire

The B2B Buying Insights Survey 2026 was structured around 18 question areas:

1. Type of purchase
2. Purchase trigger
3. Buying-cycle length
4. People and functions involved
5. Supplier identification
6. Shortlist and supplier evaluation
7. Stage of supplier engagement
8. Perceived risks
9. Internal efforts required
10. Use of AI
11. Influence of AI on supplier decision
12. Expected influence of agentic AI
13. Buying criteria
14. Supplier selling approach
15. Seller behaviors experienced
16. Perception of proactive salespeople
17. Ongoing supplier support valued
18. Purchase outcome

Definitions used in the report

Traditional product purchase

A relatively standardized purchase where the product or service is familiar, the buying process is more routine and the implementation consequences are limited.

Highly complex purchase

A purchase involving higher strategic importance, more stakeholders, greater perceived risk, broader implementation consequences and more internal coordination.

Buying network

The group of people, functions and stakeholders who influence, approve, evaluate, block, implement or are affected by the purchase.

Initial shortlist

The group of suppliers considered by the buyer at the early stage of supplier evaluation.

Perceived risk

The risks or concerns buyers considered when making the purchase, such as implementation risk, adoption risk, supplier collaboration risk, security risk, compliance risk or reputational risk.

Decision confidence

The buyer's confidence that the problem is worth solving, the selected solution is credible and the organization can implement the decision successfully.

Additional respondent and company profile data

These questions describe the respondent base and provide background context for the study.

Company size

Note: Respondents from companies with fewer than 50 employees were screened out and did not continue the survey. The study was designed to include only organizations with 50 or more employees.

Company size, employees	Share of respondents
50-249	41%
250-999	31%
1000 or more	28%

Respondent generation

Generation, year of birth	Share of respondents
Baby Boomers, born 1946-1964	8%
Gen X, born 1965-1980	67%
Gen Y, born 1981-1996	22%
Gen Z, born 1997-2012	3%
Other/prefer not to say	1%

Additional information about the analyzed purchase

Respondents were asked to describe their role in the specific purchase and the nature of the product or service purchased.

Respondent role in the purchase

Note: Multiple responses allowed.

Role in this specific purchase	Share of respondents
Decision maker – final authority	28%
Technical evaluator – assessed solutions/suppliers	27%
Influencer – shaped the decision	27%
Budget owner – approved the budget	25%
Procurement – managed supplier selection and negotiation	25%
User – responsible for use or implementation	15%
Other (please specify)	4%

Type of product or service purchased

Note: Multiple responses allowed.

Type of product or service	Share of purchase
Standardized product/service (off-the-shelf)	31%
Customized product/service (adapted to our needs)	65%
Fully tailored solution (designed specifically for us)	28%

Strategic importance of the purchase

Strategic importance	Share of purchases
High strategic importance – business-critical	40%
Moderate importance – relevant but not critical	54%
Low importance – routine or administrative	5%

Additional survey findings not included in the main report

The following results were not included in the main storyline but provide additional context on how buyers use external support and interact with suppliers.

Use of external consultants or advisors

External advisors were used in a minority of purchases. When used, they primarily supported specification, evaluation and decision preparation rather than supplier recommendation.

Did the buying team hire external consultants or advisors?	Share of purchases
Yes	11%
No	87%
Don't know	3%

Role of external consultants or advisors

Base: Purchases where external consultants or advisors were used.

Note: Multiple responses allowed.

Role played by external consultants or advisors	Share of purchases using advisors
RFP or specification preparation	58%
Solution evaluation and comparison	50%
Strategic advice / decision support	33%
Supplier evaluation / pilot testing	25%
Negotiation or contract support	8%
Recommended a supplier	0%

Mix of in-person and virtual supplier interactions

Supplier interaction is now clearly hybrid. Only 16% report mostly in-person interaction, while 40% report more virtual than in-person or mostly virtual interaction. This reinforces the importance of combining digital accessibility with human trust-building.

Typical mix of supplier interactions	Share of respondents
Mostly in-person (>75%)	16%
More in-person than virtual	16%
About half in-person / half virtual	28%
More virtual than in-person	20%
Mostly virtual (>75%)	20%

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