

SALES TECHNOLOGY + BUYER COMPLEXITY

Stop Asking Your Sales Stack to Understand the Buyer for You

Automate the repeatable work. Keep a person responsible for the questions your software cannot settle.

For SaaS sales and RevOps leaders choosing where to use sales technology

A completed field is not a completed decision

Before you automate another part of the sale, ask a less comfortable question: do we understand what the buyer needs, or have we merely captured what they said? Our recommendation is to separate those jobs. Use technology to collect and organise information. Decide explicitly who handles the meaning, trade-offs and unanswered questions before that information drives a commitment.

Do not assess a tool against the vague ambition to “make sales more efficient”. Name the task: record a requirement, suggest a configuration, or decide what to promise. Those tasks carry different consequences when the buyer’s answer is incomplete. A useful evaluation should show which decision remains with a person, rather than treating every filled field as an answer. For a first pass, ask how much your solution changes between buyers and how much their requirements differ. These are practical prompts, not a formal complexity score.

What the research actually supports

The authors of The contingent effects of innovative digital sales technologies on B2B firms’ financial performance propose assessing offering complexity and demand complexity before deciding how extensively to implement digital sales technologies. This is their recommendation, not a rule that a complicated sale automatically needs more software. [1]

In their discussion, the authors also argue that human involvement, including empathy and intuition, becomes more important as customer requirements become more complex. We use that as a reason to examine the division of work between technology and people, not as proof that a particular staffing model improves revenue. [1]

These recommendations come from cross-industry B2B research, not a SaaS-only population. They are attributed author interpretations, not a verified promise of returns from a particular sales tool. [1]

The worksheet below is our proposed application. It is not the paper’s measurement instrument or a validated sales-performance model.



THE WORKED EXAMPLE

Same words. Different job.

Consider a fictional workflow-software company evaluating a system that turns discovery notes into a recommended configuration. A buyer says, “We need approval controls.” One prospect means a manager approving a purchase. Another needs different approval routes across business units, with exceptions for urgent work. The same phrase does not tell the fictional seller which design to promise.

In this fictional example, the sales leader keeps the tool for capturing the request and highlighting missing details. A solutions consultant asks the second buyer who can approve what, which exceptions matter and what the existing process must preserve. The completed decision is specific: allow the tool to prepare the record; require that conversation before proposing a configuration. No revenue improvement or customer outcome is claimed.

Do not put a human checkpoint everywhere

A standard requirement with a clear answer is a credible alternative. If the buyer asks whether an existing feature is included in a named package, use the maintained product information and an appropriate automated response. Escalate contradictions or missing information. Do not add a specialist meeting simply to make the process look responsible.

Apply the same distinction when buying software. If the real gap is an unanswered customer question, first test a better question with the current team and tools. If the answer is already well defined but repeatedly lost or copied, evaluate automation for that recording task. Buying nothing new must remain a valid decision.

Make the tool prove one useful thing

Choose a repeatable requirement and a genuinely ambiguous one from comparable, anonymised opportunities. Record what the tool captures, what it leaves unresolved and what decision a person would make differently. Agree what would make a limited trial worth continuing before seeing its output. Track useful work saved alongside corrections and unresolved requirements; a polished summary alone is not your success measure.

Leave with a boundary you can explain: automate this task, ask this customer question, and name this person to handle exceptions. Expand the trial only when the actual records justify it. The goal is a better division of work, not a longer software shopping list.



Turn an idea into a next move

Choose one sales task before expanding automation. Record the task, unresolved requirement, responsible person and trial decision. The examples below are fictional.

1. Name the task, not the tool

Write the exact action being considered. Fictional completed example: prepare a proposed configuration from discovery notes.

2. Separate standard from ambiguous

What varies between buyers? Fictional example: "approval controls" might mean one manager or several conditional approval routes.

3. Draw the boundary

What may the tool do, and what must be clarified? Fictional example: capture the request and missing details; clarify approval routes before proposing a design.

4. Assign the unresolved question

Name the person and the customer question. Fictional example: the solutions consultant asks which exceptions the existing process must preserve.

5. Choose what to test or leave alone

Compare current and proposed work on comparable cases. Record useful work saved, corrections and unresolved requirements. Continue, narrow or stop; no new purchase is also a valid answer.

Source and limits

[1] Maximilian Friess, Till Haumann, Sascha Alavi, Alexandru Ionut Oproiescu, Christian Schmitz and Jan Wieseke. The contingent effects of innovative digital sales technologies on B2B firms' financial performance. International Journal of Research in Marketing, 2024; discussion and implications, PDF pages 15-16. Cross-industry B2B research, not a SaaS-only population. We use the authors' recommendations, graded C for these attributed interpretations; no technology ROI, causal effect or universal staffing rule is claimed. The example and worksheet are GTMA proposals.

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