

0001	+0.47	+1.21%
0002	-0.32	-2.34%
0003	-1.85	-1.99%
0004	+0.27	+0.58%
0005	+2.97	+3.46%



PERFORMANCE
INSIGHTS

Introduction

- ✓ A Preview of our Research
- ✓ What We Learned
- ✓ The Story of Ann & John in Dallas, Texas



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INSIGHTS

Today's Sales Call Preparation Problem (despite millions spent)

- ✓ **Initial Meetings Are Difficult**
- ✓ **Less than 30%** of initial sales calls result in a second meeting
- ✓ **40% to 60%** of sales opportunities end in 'no-decision'



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I keep asking myself:

**Why are good salespeople losing deals that
no one else is winning?**



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Our Research Overview

- 16 Months (January 2025 to April 2026)
- 16 researchers surveying and interviewing 196 buyers (CFOs) in 14 US markets and 92 high-performing commercial bankers introduced to us by the CFOs.
- Businesses ranged from about \$5 Million to \$50 Million annual revenue.



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Our Sales Call Preparation Hypothesis (despite millions spent on CRM, sales data, sales training and other sales enablement tools)

- **“No time”**
- **“No trust”**
- **“No how”**



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A Preview of What We Learned

- ✓ You Will All Get A Copy of Our Research
- ✓ You Will Get a Copy of 'The Decision Window Playbook'



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We Found:

62% of today's CFOs say the buying experience is “**outdated**” – and believe they have changed more than the salespeople who are just focused on an old relationship model. By the time a salesperson shows up, **the bar is extremely high**. Buyers don't need information—they need **insight and sense-making**. Buyers want fewer sales interactions - but better ones.



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The Four Challenges

Undermining Customer Confidence



- ✓ **Decision Complexity**
- ✓ **Information Overload**
- ✓ **Objective Misalignment**
- ✓ **Outcome Uncertainty**



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The Low Regret Decision



The CFOs tell us that it is much more important to have **confidence in their own decision making** than the bank or salesperson they are working with.



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What Does Confidence Mean

The Tradition View: Confidence in the Bank and Salesperson

The CFO's View: It is much more important to have confidence in their own decision making than the bank or the salesperson.



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The CFOs report that when they have a high degree of decision confidence, they are over **10 time more likely to make a low-regret purchase from a bank.**



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61% of buyers:

- prefer a salesperson-free experience

74% complete:

- more than half their journey before engaging
- **75% of buyers say most interactions**
 - fail to add value



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What Buyers **HATE**

Lack of Preparation



- “Tell me about your business”
- Asking for information easily found online
- No awareness of:
 - Recent news
 - Financial trends
 - Industry pressures



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The New Definition of “Value”

Old definition:

“Providing helpful information”

New definition:



“Helping the customer make a better decision than they would without you” – making sense of complexity and feeling more confident acting.



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Timing

- Before decision window

Make Buying Easier

- 74% of CFOs feel overwhelmed

Amplifying Customer Agency

- 'a sense-of-agency' is critical



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The CFO's Complexity

The 'Storm'



Signals of Change

Decision Events



The decision window does not open when change occurs.

It opens when pressure becomes clear enough to require action.

And in many cases, it is the *sales conversation* itself that creates that clarity.



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The CFO's Complexity

The 'Storm'



According to 78% of our CFOs, the optimal time to arrive is when enough pressure exists to make the conversation meaningful, BUT before the CFO has fully defined the problem on their own or with another bank and is searching for clarity – trying to make sense of the 'Storm'.

The CFO's Complexity

The 'Storm'



Addressing the Four Challenges Undermining Customer Confidence

- ✓ Insights
- ✓ Sense-Making Conversations

The CFO's Complexity

The 'Storm'




- ✓ Decision Complexity
- ✓ Information Overload
- ✓ Objective Misalignment
- ✓ Outcome Uncertainty

The CFO's Complexity

The 'Storm'



The Decision Window Playbook



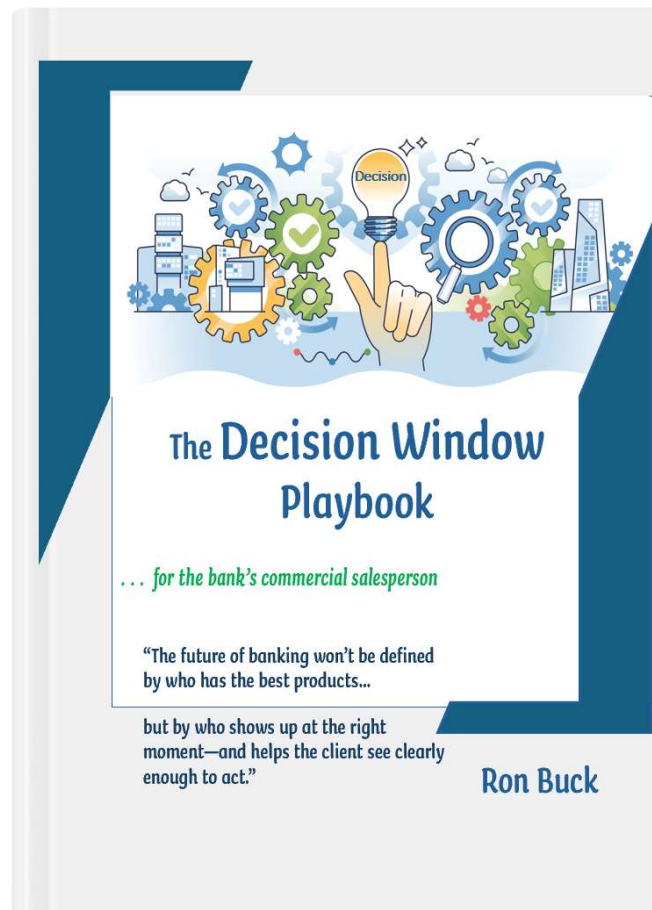
Our research shows that sellers who **engage early** with insight and a sense-making conversation have an advantage over challengers by 30 to 180 days and they close deals 30% to 40% faster with a



32% reduction in ‘no-decisions’



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This book shows us that winning is showing up early and boosting the CFO's confidence in **their own ability to feel confident they are making the right decision.**

The Story of Ann & John



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From John's Point of View Everything Looks Okay:

- No declining balances
- No major shift in account balances
- No major shift in transactions
- No closed accounts
- No calls or inquiries from the client
- Next call scheduled for loan review in 3 months.



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From Ann's Point-of-View:

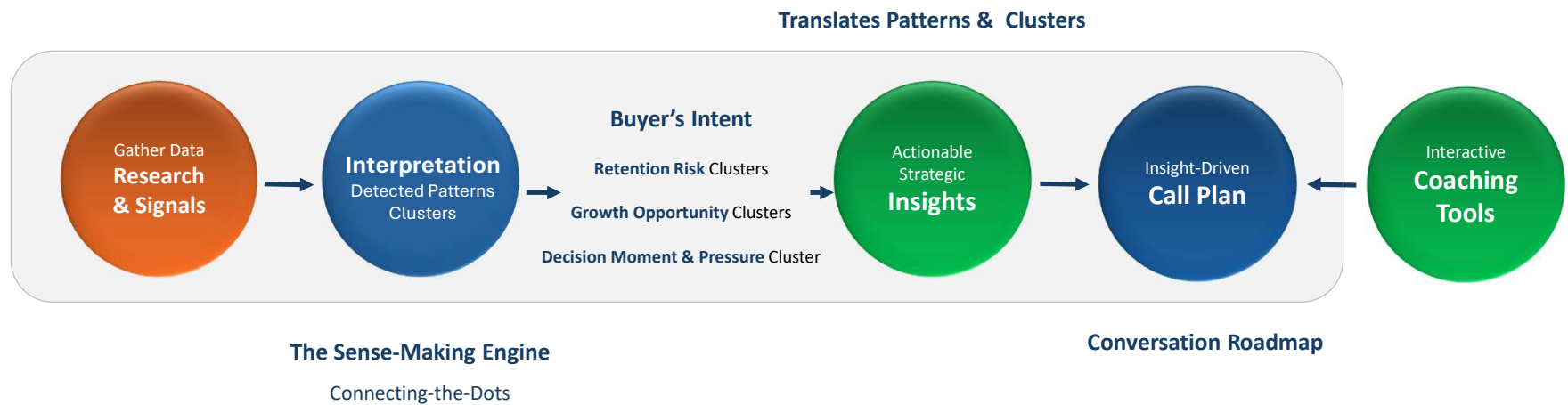


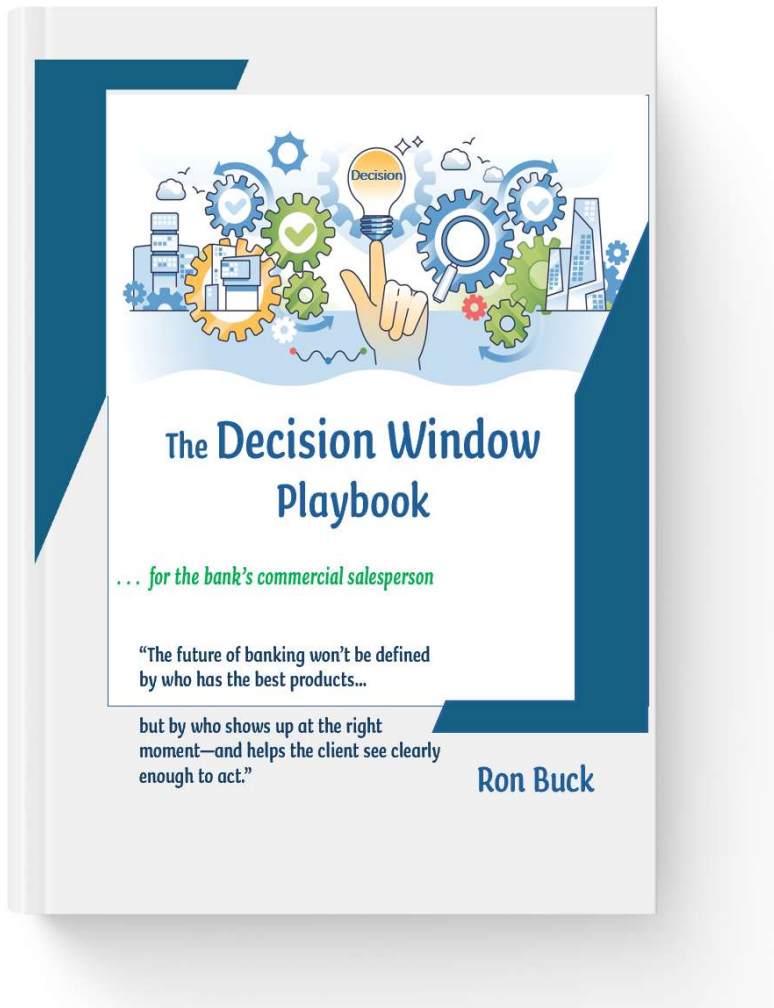
- An industry publication has interview with CEO that indicates they are in a big growth curve of 30% annually due to a new product release.
- A local press release announces an \$18 Million new warehouse and shipping facility.
- The Indeed job board indicates 50 new positions for the new facility



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AI Navigator In one minute





Request a FREE copy of

Ron's Research

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