



Selling Complex Technical Solutions and Capital Equipment: Building a Funnel Based on Expert Consulting and Value Creation

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Abstract

This article explores the specifics of designing and managing a sales funnel for complex technical solutions and capital equipment, where traditional transactional models show low effectiveness. The goal of the work is to develop a methodology for constructing a funnel based on integrating expert consulting and a co-creation of value process with the client at every stage. The methodology includes an analysis of the theoretical foundations of consultative selling, systematization of the stages of an adapted funnel, and examination of practices from international industrial companies. The results demonstrate that an effective funnel for complex solutions shifts the focus from opportunity qualification to problem diagnosis, and from product presentation to joint solution design and justification of economic impact. The practical significance of the study lies in providing a structured funnel model, containing specific objectives, interaction methods, and criteria for stage transitions, which allows the commercialization process in high-tech industries to be systematized.

Keywords: *Complex Technical Solutions, Equipment Sales, Sales Funnel, Expert Consulting, Value Creation, Value-Based Selling, Sales Cycle.*

INTRODUCTION

Sales of complex technical solutions and capital equipment are characterized by high unit cost, long decision-making cycles, involvement of multiple stakeholders on the client side, and significant dependence of final success on post-sale implementation and service. In these conditions, a classical linear sales funnel, focused on rapid conversion and objection handling, is inadequate.

The relevance of developing specialized models for managing the commercial cycle is linked to the need to transform the seller's role from product supplier to strategic partner and consultant, capable of identifying hidden business problems of the client and quantitatively justifying the value of the proposed solution. The aim of this article is to analyze and synthesize approaches to building a sales funnel in which the stages of the traditional process are reinterpreted through the lens of expert consulting and co-creation of value. To achieve this goal, tasks include studying the theoretical foundations of consultative selling, designing the structure of the adapted funnel, analyzing practical examples of its application, and assessing the impact on final business results.

FROM TRANSACTIONAL EXCHANGE TO VALUE CO-CREATION

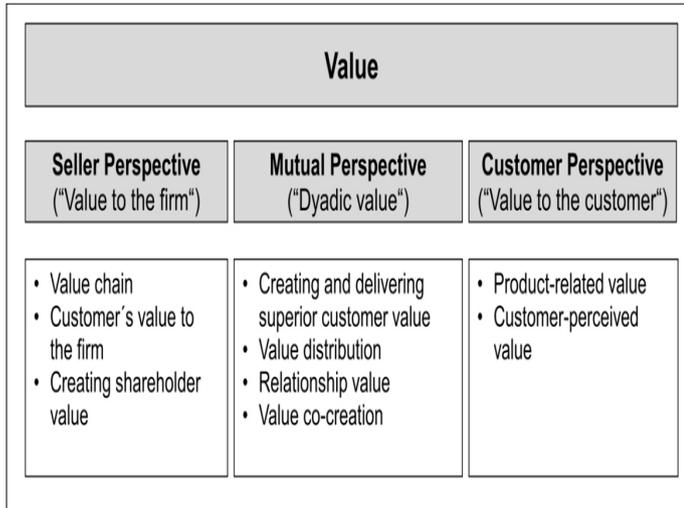
Selling complex solutions requires a shift from the "product-for-money" exchange paradigm to a co-creation of value paradigm. The theoretical basis for this is the concept of value-based selling, which defines value not as an inherent property of the product but as the client's subjective assessment of the economic, technical, and strategic benefits derived from its use. In this model, the seller acts as a resource integrator whose task is to deeply understand the client's business context, operational processes, and strategic goals in order to propose a solution that maximizes performance [5].

Another important theoretical foundation is Neil Rackham's SPIN Selling model, developed specifically for large-scale sales. The model structures dialogue around identifying and developing situational, problem, implication, and need-payoff questions. Its central premise is that success in complex sales is determined not by the ability to present features but by the ability to help the client recognize hidden problems, quantify their cost, and understand the value of solving them. This approach directly contrasts with the traditional practice of "loading" the product with a list of advantages [1].

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STRUCTURE OF THE CONSULTATIVE FUNNEL: STAGES AND KEY DISTINCTIONS

A sales funnel for complex solutions, built on the principles of expert consulting, differs fundamentally from a traditional funnel in the type of activity performed at each stage. It can be represented as a nonlinear, iterative process consisting of five interconnected stages.



Stage 1 — Problem Identification and Diagnosis

Unlike the traditional "lead generation" stage, where the goal is to find an interested party, this stage focuses on identifying companies with unrealized potential or hidden operational problems that the clients themselves may not fully recognize. Methods include industry research, analysis of publicly available performance data of potential clients, and participation in specialized events to uncover "pain points." Opportunity qualification is based not on budget and timing, but on the severity of the problem, the client's willingness to discuss it, and the strategic potential of cooperation.

Stage 2 — Quantitative Assessment of the Problem and Solution Visioning

At this stage, the consultant-salesperson conducts an in-depth analysis of the client's processes, often in the form of a preliminary audit or joint workshop. The goal is to translate qualitative problems into quantitative metrics: downtime costs, losses from defects, missed revenue due to low productivity, and excessive operational expenses. Together with the client, a vision of the ideal state after resolving the problem is formed, creating the basis for a technical and economic justification [2].

Stage 3 — Collaborative Solution Design and Justification

This is the central stage, where the vendor's proposal is developed not in isolation but in close collaboration with the client's technical specialists and future users. The salesperson coordinates the work of engineers, finance teams, and project managers to develop a comprehensive solution that includes equipment, software, implementation services,

training, and support. A detailed economic justification is created, demonstrating total cost of ownership and expected return on investment.

Stage 4 — Solution Legitimization and Procurement Process Management

Due to the involvement of multiple stakeholders, the salesperson actively participates in the client's internal processes, helping internal champions justify the solution to the finance department and senior management. Activities include preparing materials for tender committees, responding to technical and commercial inquiries, and organizing site visits to operational facilities.

Stage 5 — Agreement Implementation and Deployment Management

In complex sales, signing the contract is not the end but the beginning of a new phase of the relationship. The salesperson's responsibility extends to monitoring adherence to delivery milestones, coordinating installation and commissioning, and ensuring user training. Successful implementation serves as proof of the declared value and lays the foundation for repeat sales and referrals [3].

CONDITIONS FOR EFFECTIVENESS AND OVERCOMING ORGANIZATIONAL CHALLENGES

Successful operation of a consultative sales funnel requires certain organizational conditions within the vendor company.

First condition — retraining commercial staff.

Sellers of complex solutions must possess hybrid expertise: deep technological understanding, financial analysis skills for building business cases, and competencies in facilitation and project management. This requires investment in continuous learning and often leads to the formation of commercial teams that include both a sales manager and an engineer [6].

Second condition — restructuring motivation and KPIs.

Traditional metrics, such as the number of cold calls or monthly closed contracts, become counterproductive. Priority shifts to metrics reflecting interaction quality: depth of diagnostic analysis, number of client-side stakeholders involved, quality and detail of economic justification, and success in post-sale implementation stages. The evaluation period for a salesperson's performance should align with the length of the sales cycle.

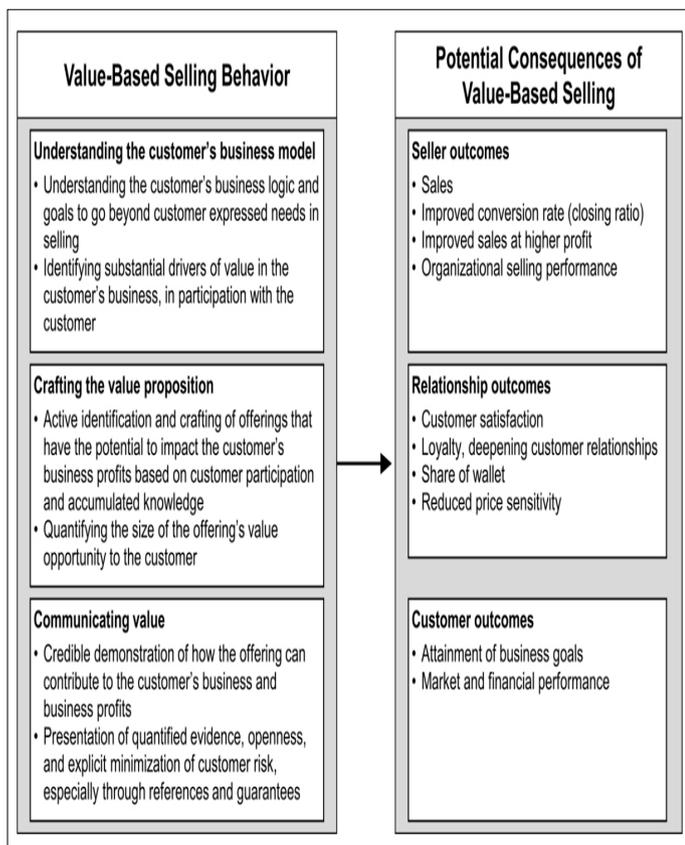
Third condition — internal cross-departmental collaboration.

Building a comprehensive solution requires close interaction between the sales department, engineering and technical teams, R&D, service departments, and finance. End-to-end

processes and cross-functional project teams tailored to specific client projects must be established. Organizational fragmentation is a common cause of complex deals falling through at later stages [4].

Fourth condition — development and maintenance of sales support infrastructure.

This includes a library of successful business cases, ROI calculation templates, solution demonstration tools, and platforms for collaborative client work on projects. Investment in such infrastructure is critical for scaling the consultative approach.



CONCLUSIONS

Sales of complex technical solutions and capital equipment require a fundamental reconsideration of the sales funnel architecture. An effective model moves away from the linear logic of “attract — qualify — present — close” toward an iterative process centered on expert consulting and co-creating value with the client.

The main finding of the study is the need to transform the role of the salesperson from a traveling sales representative

into a business consultant and solutions integrator. The corresponding funnel shifts the focus from product presentation to in-depth problem diagnosis, quantitative assessment, and collaborative design of a comprehensive solution with an economic justification.

Practical recommendations for companies include investing in the retraining of commercial teams, redesigning incentive systems toward long-term success metrics, fostering internal cross-functional collaboration, and building infrastructure to support consultative sales. The proposed funnel model and maturity diagnostic framework can serve as a foundation for such transformation. The approach is most applicable in industries with long sales cycles, high-value solutions, and a significant role for post-sale implementation, such as heavy machinery, industrial automation, energy, and enterprise IT solutions. Further research could focus on quantitatively assessing the correlation between the degree of implementation of the consultative model and metrics such as client profitability, repeat sales share, and business resilience to economic cycles.

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