

# Building a Sales Discipline

How Leading Sales Organizations Design, Deploy, and Monitor Effective Sales Teams



## The Growth Paradox: Why Scaling Breaks the Founder-Led Sales Model

For any high-growth company, there is a moment of reckoning. The scrappy, instinct-driven sales approach that secured the first 10, 50, or 100 customers begins to falter. Growth stalls, forecasts become unreliable, and the cost of acquiring new revenue climbs. The common reaction is to hire more salespeople, but this often magnifies the problem rather than solving it.

**This is the growth paradox: the very success of early-stage, "hero-based" selling creates the complexity that prevents the company from scaling effectively.**

Early-stage companies rightly rely on their most talented and intuitive individuals—often the founders themselves—to win business. Success is built on personal relationships, deep product knowledge, and sheer force of will. This apprentice-based model works when the team is small, but it is inherently fragile. The “process” is locked inside the minds of a few key players, making it nearly impossible to replicate, onboard new hires efficiently, or predict future performance. This ad-hoc, business-as-usual approach is the primary reason why high-growth companies struggle to maintain their trajectory. To break through this plateau, companies must transition from relying on individual talent to building a disciplined, systematic revenue engine.

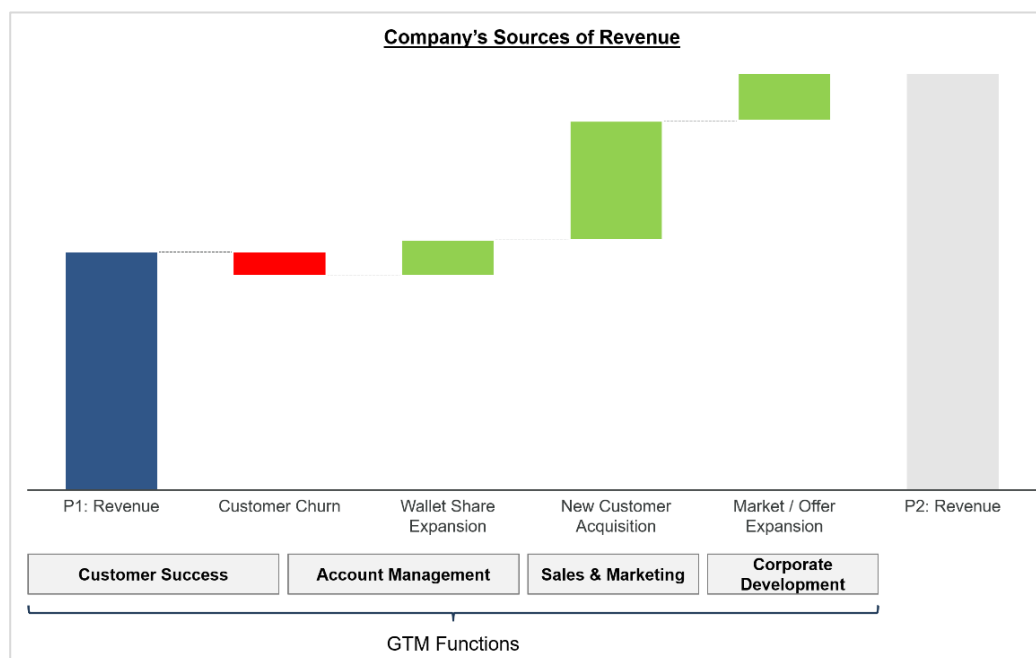
This transformation requires building an internal framework—a **Sales Discipline**. Leading sales organizations deliberately design this discipline around four key pillars: **Strategy, Process, Structure, and Governance**. This framework converts individual talent into a collective, scalable capability, enabling predictable and profitable growth.

## Step 1: Deconstruct Your Revenue, Align Your Team

Before building the pillars, a sales discipline must start with a clear, granular understanding of every source of revenue. Too many organizations view sales through the single lens of "new logo acquisition," ignoring the distinct motions required to manage the full customer lifecycle. A robust go-to-market (GTM) engine is built to manage five distinct revenue levers:

1. **Customer Retention / Churn Mitigation:** Proactively manage and retain at-risk customers and revenue.
2. **Share of Wallet Expansion:** Systematic up-selling and cross-selling to grow revenue from the existing customer base.
3. **New Customer Acquisition:** Land new logos within established markets and segments.
4. **Market Expansion:** Strategically enter new products, service lines, geographic territories or industry verticals.

Each of these levers requires a different strategy, skillset, and process. Critically, ownership for them must be clearly defined across the entire go-to-market (GTM) organization, not just shouldered by a monolithic "sales" department.



## Example in Practice: A B2B SaaS Portfolio Company

Consider a PE-backed software company. Instead of having every sales rep "do it all," they can create clarity and focus by aligning GTM functions to these revenue levers:

- **Customer Success** owns *Churn Mitigation* and *Retention*, measured by Net Revenue Retention (NRR). Their focus is on adoption, value realization, and proactive account health monitoring.
- **Account Management** owns *Share of Wallet Expansion*. They are responsible for identifying and closing up-sell and cross-sell opportunities within the existing customer base.
- **Marketing & Sales Development (SDRs)** are jointly responsible for generating qualified leads for *New Customer Acquisition*.
- **Account Executives (AEs)** own the sales cycle for *New Customer Acquisition*, focused on converting qualified leads into new logos.
- **Corporate Development & Sales Leadership** own *Market Expansion*, a strategic project requiring market analysis, product localization, M&A considerations and a dedicated launch plan.

This alignment ensures that every dollar of revenue has a clear owner and a purpose-built motion designed to capture it.

## Step 2: Constructing the Four Pillars of a World-Class Sales Discipline

With revenue levers defined and owned, **leadership can design the playbook that enables execution at scale**. This playbook is built upon the four core pillars—Strategy, Process, Structure, and Governance. They are not independent concepts; they are an interconnected system where a change in one directly impacts the others.

### ***Pillar 1: Strategy – The "What" and "Why"***

A defined sales strategy answers the most fundamental questions: Who are our most profitable customers? What specific pains do we solve for them? How do we uniquely position ourselves against competitors? It ensures that the entire GTM organization is focused on its Ideal Customer Profile (ICP), the highest-value opportunities, and prevents the team from wasting resources chasing low-propensity or unprofitable deals.

- **Practical Example:** An industrial parts distributor, after analysis, discovered that while they served many industries, their highest margins and sales velocity came from mid-sized aerospace maintenance facilities. They explicitly defined their ICP and assigned current customers and prospects. They refined their value proposition around inventory reliability and compliance—the key value drivers for this segment—and de-emphasized other, less profitable verticals.

### ***Pillar 2: Process – The “How”***

Process codifies the strategy into a set of repeatable actions. **It is the operating manual for the sales engine**, defining the stages of a deal, the key activities within each stage, and the collateral required to move a deal forward. A well-defined process makes success predictable and scalable, enabling new hires to become productive quickly and providing a common language for the entire team.

- **Practical Example:** The aerospace distributor formalized their sales process into five distinct stages within their CRM: (1) Qualification, (2) Technical Discovery, (3) Solution Proposal, (4) Procurement & Negotiation, (5) Closed-Won. Each stage included a checklist of required activities, such as "Complete a site needs assessment" in Discovery or "Deliver a TCO analysis" in the Proposal stage.

### ***Pillar 3: Structure – The “Who”***

Structure is the organizational design that brings the process to life. It's about getting the right people in the right roles with clear responsibilities to maximize efficiency and effectiveness. As companies scale, a "generalist" sales role becomes a significant bottleneck. A deliberate structure aligns roles to the specific tasks defined in the sales process.

- **Practical Example:** The distributor's old "cradle-to-grave" sales rep model was inefficient. They restructured the team into specialized roles:
  - **Inside Sales Reps** to handle inbound leads and smaller, transactional accounts.
  - **Field-Based Account Executives** to focus exclusively on acquiring and growing the high-value aerospace maintenance accounts.
  - **Technical Specialists** who could be deployed to support complex deals, freeing up AEs to focus on commercial aspects.

### ***Pillar 4: Governance – The “How We Measure and Improve”***

Governance is the management system that enforces the discipline. It is comprised of metrics, meeting cadences, coaching frameworks, and reporting that monitor performance and drive continuous improvement. Without it, even the best strategy and process will decay over time. Strong governance transforms the playbook from a static document into a dynamic, learning system.

- **Practical Example:** The firm's leadership implemented a governance model including a weekly pipeline review where AEs were required to discuss deals based on the defined sales stages and exit criteria. They tracked KPIs such as stage-by-stage conversion rates and sales cycle length. Managers used this data not to micromanage, but to identify coaching opportunities (e.g., “I see many of your deals are stalling at the Proposal stage. Let's role-play how we present the TCO analysis”).

## A Practical Approach to Building Your Sales Discipline

These pillars cannot be designed in a vacuum. They must be deliberately defined and managed based on external market insights, a deep qualitative and quantitative understanding of your customers (through win/loss analysis and interviews), and the formalization of your internal capabilities.

For companies looking to build or refine their Sales Discipline, we recommend a phased approach:

- **Phase 1: Diagnose & Design.** Begin with a comprehensive assessment of the current state across the four pillars. This data-driven diagnosis identifies the most critical gaps and highest-impact opportunities. The output is a clear, future-state blueprint for the company's unique Sales Discipline.
- **Phase 2: Deploy & Enable.** This phase is about effective change management. It involves rolling out the new processes and playbooks, delivering hands-on training to managers and reps, and configuring enabling technologies like the CRM to support the new system.
- **Phase 3: Monitor & Optimize.** With the system live, the focus shifts to execution and improvement. This phase involves embedding the governance cadence—the meetings, coaching, and KPI reporting—to create a feedback loop that ensures the Sales Discipline is not just followed, but consistently refined and optimized over time.

One of our clients, a PE-owned healthcare software provider, faced stagnating growth. By implementing this approach, they redefined their strategy to target private specialty clinics, built a new playbook for that segment, bolstered their team with specialized roles, and implemented a data-driven governance model. The result was a 30% increase in qualified pipeline and a 20% reduction in sales cycle length within nine months, putting them firmly back on track to achieve their investment thesis.

Building a Sales Discipline is the definitive next step in transitioning from an unpredictable, high-effort sales function to a scalable, predictable revenue engine. It is the key to unlocking sustainable growth and maximizing equity value in today's competitive landscape.

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