WHITE PAPER · THE FUTURE OF SELLING

The Future of Selling

From Value Selling to Value Engineering

Why suppliers must redesign value across five dimensions — and what the human role becomes when AI commoditises everything else.

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Future of Selling · Solvay · AMS · Cranfield

JUNE 2026

From Systemic Risk to Systemic Value

A single chain of cause and effect is reshaping B2B selling. This is the chain, and the four trends that follow from it.

The research programme — how salespeople add value

This paper is part of a research programme that began in 2009, asking one durable question: **how do salespeople add value to their customers**? Back then, two drivers were reshaping the answer. The first was technology — the rise of e-commerce, which began to eliminate the parts of the sales function whose value had been information exchange. The second was the pressure for faster innovation as globalisation made companies compete with everyone almost overnight. Both pushed companies toward deeper customer involvement, and value co-creation became the dominant trend of the 2010s — work published in

From Selling to Co-Creating (Lemmens and Marcos, 2014) and in the Harvard Business Review article *Entrepreneurial Selling* (Lemmens, March 2018). Fifteen years later, both drivers have shifted. Technology has not slowed — e-commerce was followed by social media and now AI, which is finishing the commoditisation of information the internet began. But innovation as a stand-alone differentiator has been displaced. The pressure that now sits alongside technology is climate change and its commercial consequences. The question is unchanged; the answer is being rewritten. This paper traces how.

One chain of cause and effect

B2B selling is being reshaped by a single chain of cause and effect. Four decades of accumulating global shocks — climate, social, geopolitical, ecological, technological — have made the world more interconnected and more fragile. That fragility has a name: systemic risk. And systemic risk is now priced — by regulators, by capital markets, by customers. What gets priced changes what buyers ask of their suppliers. The whole of this paper follows from that one chain.

MACRO SHOCKS · **climate · social · geopolitical · ecological · technological**

▼

SYSTEMIC RISK · **shocks propagate through an interconnected economy**

▼

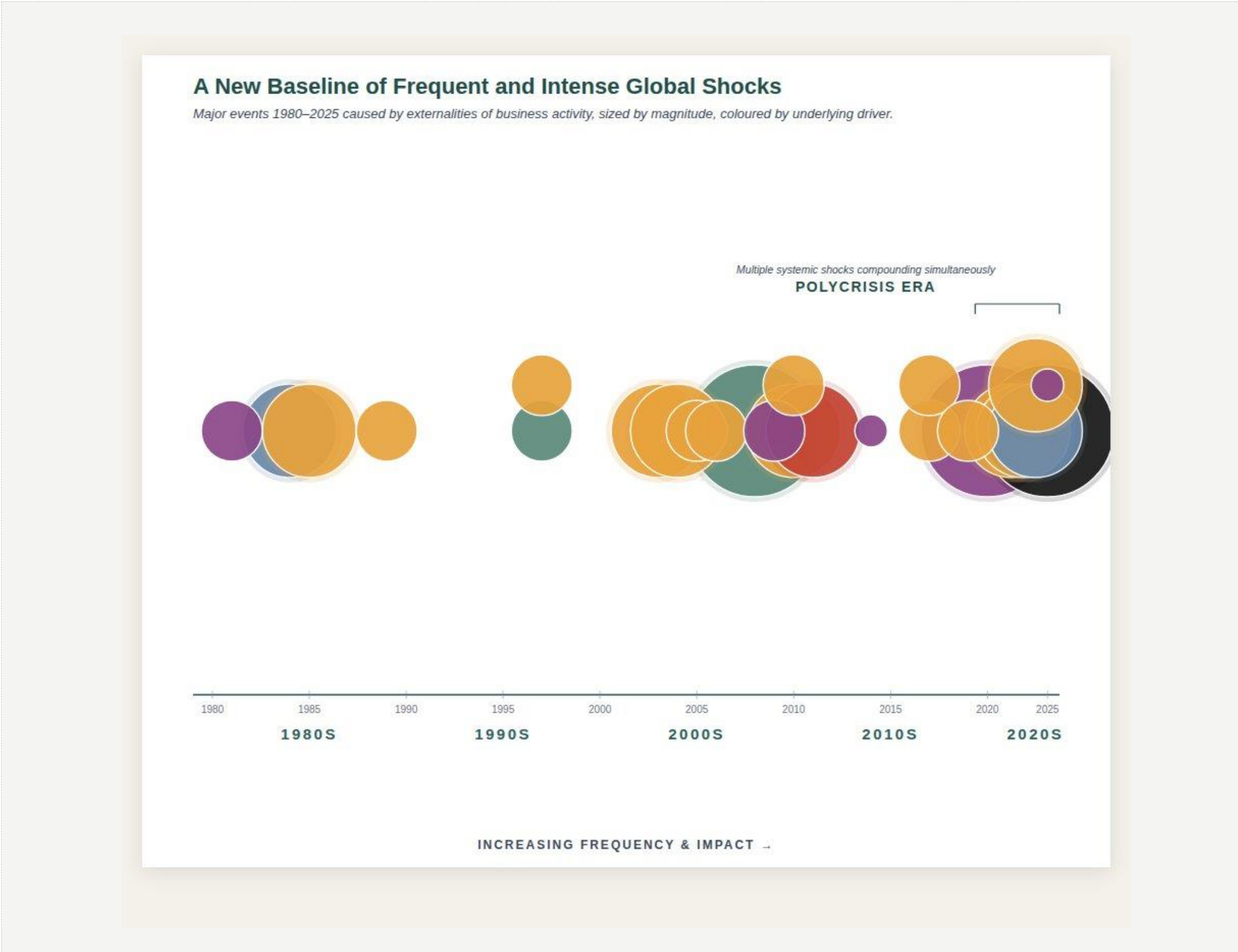
NEW RULES & RISK-PRICING · **regulation translates risk into cost of capital**

▼

DEMAND FOR SYSTEMIC VALUE · **buyers assess suppliers on whole-system impact**

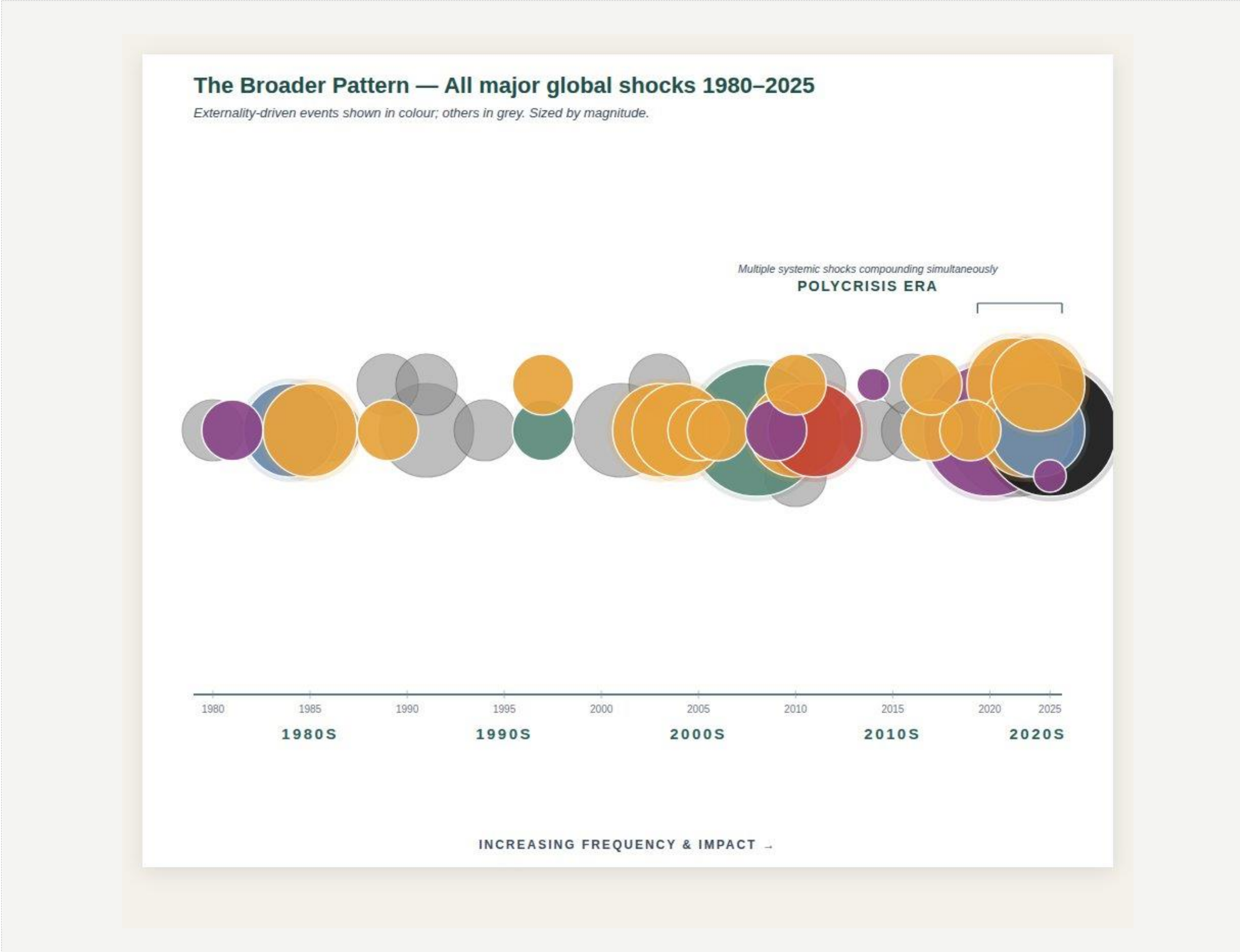
Systemic risk is the possibility that a shock affecting one actor, component, or sector spreads through interconnected relationships and threatens the functioning of the whole system. Today's level of business interconnectivity means almost any shock in the world has a near-immediate effect on a company's own operations. And the shocks are arriving faster and hitting harder than at any point in living memory.

Two charts make the trend visible. The first isolates the climate-and-planetary-boundary signal: externality-driven shocks — climate, ecological, pandemic, financial-system, and technological-externality events — between 1980 and 2025.



Major global shocks driven by externalities of business and ecological activity, 1980-2025. Sized by magnitude. Sources: Stockholm Resilience Centre, World Weather Attribution, IMF, WHO, World Bank, IPCC.

The trend is unambiguous. The 1980s recorded four externality-driven shocks with a combined magnitude of 14. The 2020s, only half-complete, have already recorded seven shocks with a combined magnitude of 28 — already double the 1980s total. The second chart adds the geopolitical and political events that compound with externality shocks to produce what observers now call permacrisis.



All major global shocks, 1980-2025. Externality-driven events shown in colour; geopolitical and other events shown in grey. Bubbles sized by magnitude.

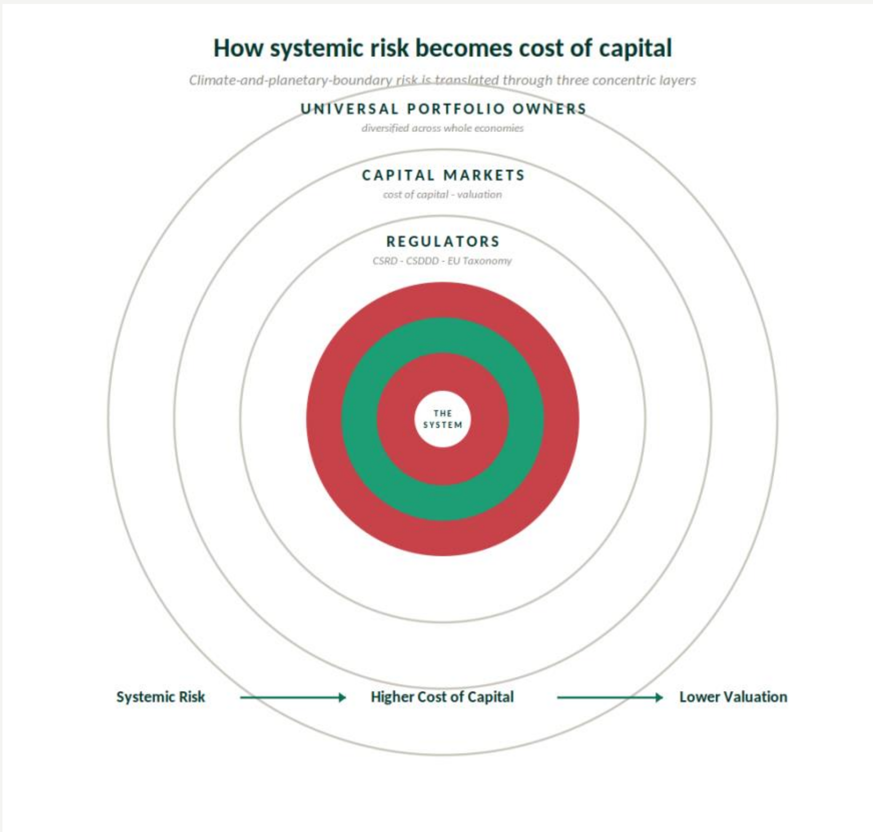
On this broader measure the 1980s recorded seven major shocks with a combined magnitude of 23; the 2020s, half-complete, have already recorded eleven with a combined magnitude of 42 — higher than any complete decade in the dataset. The shocks do not arrive independently. They form a chain: climate produces human-need shocks; human-need shocks produce political shocks; political shocks produce further economic shocks — tariffs, sanctions, supply-chain reconfiguration. These conditions are not exceptional. They are the new operating environment.

The commercial consequence is the heart of this paper. As buyers absorb the reality of systemic risk, they stop buying products and services and start buying **improvements to the system they depend on**. They are no longer asking "is this a good deal?" They are asking "does this make my whole system more resilient, and can I count on you when the next thing breaks?" This is the demand for **systemic value**: the value something creates for an entire system of interconnected actors — improving the performance, resilience, efficiency, or sustainability of the whole — rather than for a single transaction.

How systemic risk becomes a buying criterion

The chain from risk to demand runs through two translators. First, regulators translate the shocks into mandated transparency: CSRD requires companies to disclose their sustainability impacts and risks; CSDDD requires due diligence across the supply chain; the EU Taxonomy classifies which activities are sustainable. These rules are being adjusted — the Omnibus revisions of late 2025 softened some CSRD timelines — but the direction is locked in. The pace varies; the direction does not.

Second, capital markets translate that transparency into the cost of capital itself. ING demonstrates the mechanism directly. Marc Carllier, Head of Sustainability Business Banking Belgium, describes the bank's approach as translating ESG from compliance language into financing language. Sustainability is no longer an after-sales add-on; it has become a primary frame for credit decisions.



How systemic risk becomes cost of capital. Regulators translate planetary and social risk into mandated transparency. Capital markets translate that transparency into cost-of-capital decisions.

> *"We translate ESG from compliance language into financing language. Future access to capital, the cost of that capital, and the company's market valuation will all depend on it."*
>
> Marc Callier, ING, Head of Sustainability Business Banking Belgium

Marc broadens the meaning of sustainability usefully. The word does not only refer to environmental protection. It refers, originally, to sustaining a way of living — a set of values, an economic system, a civilisation. Under that broader reading, the systemic value a supplier creates spans **five dimensions** the customer is now trying to manage:

1. **ROI — economic value.** The financial return the customer captures: costs reduced, revenue unlocked, value recovered. This is the baseline B2B selling has always engaged.
2. **Risk and Resilience.** The risks the supplier can absorb on the customer's behalf — price, supply, demand, regulatory — so the customer's system holds when shocks arrive.
3. **Strategic value.** The proposition's contribution to the customer's market position, competitive advantage, and long-term capability.
4. **People value.** The impact on the customer's workforce — recruitment, retention, productivity, wellbeing — the inner ring of the Doughnut translated into B2B terms.
5. **Planet value.** Environmental impact and regulatory exposure — now financially material because they move cost of capital and regulatory risk.

Value that accrues over time — lifecycle and circular value — is not a separate dimension; it resolves into ROI where it lowers lifetime cost and into Strategic where it strengthens long-term position. These five dimensions are the content of systemic value. The four trends in this paper are about how suppliers must now justify, design, sell, and guarantee it.

The structural condition — planetary boundaries and the Doughnut

Two of the five dimensions — People and Planet — rest on a structural condition worth naming directly. In September 2025, the Stockholm Resilience Centre confirmed that seven of the nine planetary boundaries have now been breached. The most useful frame for reading what this means commercially is the Doughnut Economy, developed by Kate Raworth in 2017. The Doughnut takes the planetary boundaries as an outer ring and adds a social foundation as an inner ring — twelve dimensions of human wellbeing including food, health, income, energy, and peace. The safe and just space for humanity is the doughnut between the two rings: outside the outer ring lies ecological overshoot; inside the inner ring lies human deprivation.

The Doughnut Economy (Kate Raworth). Outer ring: nine planetary boundaries — seven now breached. Inner ring: twelve dimensions of the social foundation. The safe and just space for humanity lies between the two rings.

The framework is useful for B2B because it names a priority order that commercial reality has been following without articulating it. Human needs must be met before populations will mobilise to address planetary needs.

People who are food-insecure, energy-insecure, or income-insecure prioritise their own survival over long-horizon planetary commitments. This is not a moral failing. It is structural. In Europe in 2026, sustainability survives commercially only where it serves both rings of the Doughnut at once — where it relieves a human-need risk and a planetary risk in the same proposition. This is why, throughout this paper, the People and Planet dimensions gain commercial weight together rather than separately.

The four trends — what buyers now require of suppliers

If the demand is for systemic value, four trends follow in B2B selling. Each names something the supplier must now do that traditional value selling did not require. Each is documented with cases from the Future of Selling research programme. Together they define a commercial discipline, this paper calls value engineering — selling treated not as a single act but as design before the sale, alignment during it, and captured value after it.

The trend	What it requires of the supplier
1 · From moral claim to financial proof	Justify soft and systemic value — well-being, lifecycle, circularity, climate — in the financial language the buying coalition uses to decide. (The Systemic Business Case)
2 · From local solution to system improvement	Design the proposition to improve the customer's whole nested system across every relevant dimension — not to solve a single local problem. (The Systemic Value Proposition)
3 · From single buyer to aligned stakeholders	Sell to a coalition: a sub-value proposition for each stakeholder, all carried by the one business case, distributed rather than re-argued. (Systemic Selling)
4 · From promise to guarantee	Move from informing the decision to guaranteeing the outcome — co-accountability and the human work of behavioural change AI cannot do. (Systemic Value Success)

A note on cases. Cases that can be named are named in full. Where interviewees requested anonymisation, they are described by sector and role only.

Trend 1 — From moral claim to financial proof: the Systemic Business Case

Customers no longer buy sustainable solutions on moral grounds; they buy them on financial grounds. The soft dimensions — employee well-being, lifecycle and circularity, climate impact — only enter the decision once they are translated into a business case. The shift is not whether these dimensions matter, but that they must now clear the same financial bar as any other investment.

> **THE SUPPLIER'S JOB: JUSTIFY** — *translate systemic value into the financial language the buying coalition uses to decide.*

The first thing the demand for systemic value changes is the burden of proof. When a customer buys a product, the value is self-evident in the product. When a customer buys an improvement to their system, the value is distributed across dimensions — some financial, some about risk, some about people or position — and much of it is soft, future, or indirect. None of that survives a budget meeting unless it is translated into the language the buying coalition decides in: financial materiality. The shift is not whether these dimensions matter, but that they must now clear the same financial bar as any other investment. The systemic business case is that translation. It is the connective tissue of everything that follows, because a proposition the customer cannot justify internally is a proposition the customer cannot buy.

The values-based limit

The clearest evidence that justification has become the binding constraint is what happens when suppliers skip it. Sustainability propositions sold on environmental merits alone hit a hard ceiling under economic pressure. The supplier offers an environmentally superior product at a premium. The customer agrees in principle that sustainability matters. The customer buys the cheaper alternative anyway.

Kaneka illustrates the pattern. The Japanese chemicals firm developed Green Planet, a fully compostable bioplastic that breaks down in eight weeks — technically superior across every meaningful environmental dimension. But in the mass-market segments Kaneka had hoped to enter, willingness-to-pay is missing. Green Planet is still sold, but only to premium and luxury segments, where the customer's own brand makes the sustainability premium part of the value rather than a cost on top. The market is not gone. It is much smaller than expected.

> *"I can easily find products that are better for the environment, but my customer doesn't want to pay for it."*
>
> Marc Van Genechten and Danny Beyltiens, Kaneka Belgium

Circl, a Belgian modular construction company, found the same ceiling. The original carbon-reduction argument did not win deals. Circl reframed the proposition around the risk reduction that modular construction delivers — price stability, planning stability, financial certainty. The carbon argument now lands as a bonus rather than as the lead claim. The reframe is not cynical: sustainability is not weakened by being justified financially. It is strengthened. The CFO who could not authorise an investment on environmental grounds can authorise the same investment on risk-reduction grounds.

Sun Is Up, a solar platform, found an instructive variant where the financial case alone was also insufficient. The firm started by reselling surplus solar electricity below incumbent rates, saving the customer around fifty euros a month. The financial argument was sound. It did not work — fifty euros was not enough to overcome the hassle of managing two energy suppliers. The pivot was to reframe the proposition around community: Sun Is Up now enables an organisation, a local school in the founding example, to sell its excess solar electricity to its own community of parents, teachers, neighbours, and local shops. The school earns a better price; the community pays less. People do not just buy cheaper energy; they buy energy from their local school. A financial case and a values case, travelling together, beat either alone.

Translating the People dimension — employee wellbeing

The justification problem is sharpest on the People dimension, which has historically been treated as soft HR work — important in principle, hard to quantify, vulnerable to budget pressure. Two things are changing this. First, the data linking employee wellbeing to engagement, retention, and productivity has grown substantially over the past decade. Second, HR leaders have begun deliberately using that data to build hard financial business cases. The People dimension becomes financially material the moment an HR leader stops asking the board to believe in wellbeing and starts presenting the cost and risk of not investing in it.

A large Belgian hospital group illustrates the translation in action. The hospital group — four locations, around four thousand employees — was under intense post-pandemic pressure. Its HR director believed the hospital was carrying real and measurable costs from wellbeing problems — burnout-driven departures, technostress, aggression incidents, cascading staffing pressure — but knew that to defend a substantial investment to her board she could not rely on the principle that wellbeing matters. She did two things. She put numbers on costs the hospital was already bearing: turnover cost per departure, sick-leave cost per absent day, agency-staff premium per uncovered shift, regulatory exposure under Belgian workplace wellbeing legislation, and the documented correlation between staff wellbeing and patient-safety incidents. Then she chose a wellbeing partner whose proposition matched the financial frame — a co-created, team-level diagnostic and intervention model that could be quantified at the team level. The business case she presented was not a well-being business case. It was a financial business case in which wellbeing was the mechanism. The board approved. This is what it means to build the business case that turns an employee well-being strategy into a fundable value proposition.

From reducing harm to creating value — the regenerative horizon

Justification also has a forward edge. Sustainability under the risk-reframe is necessary but, against the trajectory of planetary-boundary breach, increasingly insufficient — seven of nine boundaries are already breached. The forward direction is regenerative value: propositions that do not merely reduce harm but actively repair the systems they touch, along a three-rung ladder from extractive to sustainable to regenerative. The early signal from the research programme is that regenerative propositions command price premiums that risk-reframed propositions do not match — Tony's Chocolonely sells at roughly a 20 percent premium for its regenerative cocoa sourcing. The business case for regenerative value is harder to build today, but it opens a price window the risk-only frame cannot reach, and suppliers who learn to justify value at that end of the ladder will compete in a market with very few competitors in it.

What Trend 1 requires. The supplier's first job is to **justify**: to translate systemic value — across all five dimensions, but most acutely on the soft People and Planet dimensions — into a financial case the buying coalition can defend. This is the Layered Business Case, the instrument that makes systemic value financially material. It runs through every trend that follows, because a proposition that cannot be justified internally cannot be designed, sold, or delivered.

Trend 2 — From local solution to system improvement: the Systemic Value Proposition

Customers no longer want only a solution to a local problem; they want an improvement to the system the problem sits in, because that is where their risk lives. A value proposition must be designed to cover every relevant dimension of the customer's nested systems, not just the layer where the symptom appears.

THE SUPPLIER'S JOB: DESIGN — *redesign the proposition to improve the customer's whole system, not solve a single local problem.*

A justified business case is worthless if the proposition behind it is still a point solution. The second trend is therefore about design. Under polycrisis conditions, the customer is no longer optimising a single purchase within a stable system; they are trying to make a fragile system more resilient. A proposition that addresses only the local problem — the product, the feature, the transaction — leaves the systemic risk untouched, and systemic risk is what the customer is now buying against. The proposition must be designed to improve the system, covering every relevant dimension of the customer's nested systems rather than only the layer where the symptom appears.

Risk and Resilience becomes the primary dimension

The clearest expression of system-level design is the rise of Risk and Resilience from a supporting dimension to a primary one. The question the customer asks has shifted from "is this a good deal?" to "can I count on you when the next thing breaks?" The supplier who absorbs risk wins; the supplier who pushes risk onto the customer — or who simply prices for the same risk without absorbing it — loses.

Kaneka describes permacrisis from the buyer's seat. The past decade has been defined by accelerating turbulence: Brexit, the Ever Given blocking Suez, COVID, the war in Ukraine, the Iran situation. Major suppliers have closed plants. Kaneka now needs two full-time legal advisers to navigate conflicting US and Chinese regulatory environments. The just-in-time orthodoxy of the 2010s has partially reversed: strategic stock build-ups are now a legitimate risk-management tool, and supply-guarantee clauses appear in contracts that did not have them five years ago. As Van Genechten and Beyltiens put it, it is always a combination of price, reliability, and trust — never just price.

Four resilience mechanisms — designing risk absorption in

Across the research programme, four mechanisms recur as the operational expression of Risk and Resilience value. Each is a design choice — something built into what the supplier sells, not merely asserted in how they describe it.

Price stability. The supplier absorbs commodity volatility on the customer's behalf. A Belgian B2B food distributor guarantees prices to restaurants for six months in a market where others reset monthly.

Supply guarantee. The supplier maintains delivery even when individual orders are loss-making. Kaneka delivers on unprofitable orders because the long-term relationship is worth more than the short-term margin.

Outcome guarantee. The supplier prices for delivered results rather than hours, units, or modules — the design move that Trend 4 develops into co-accountability.

Capability replacement. The supplier provides capabilities that the customer cannot develop or retain in-house. The half-prepared meals and integrated services the food distributor builds for the hospitality sector are exactly this — the customer cannot find kitchen staff or run a full benefits ecosystem at their scale.

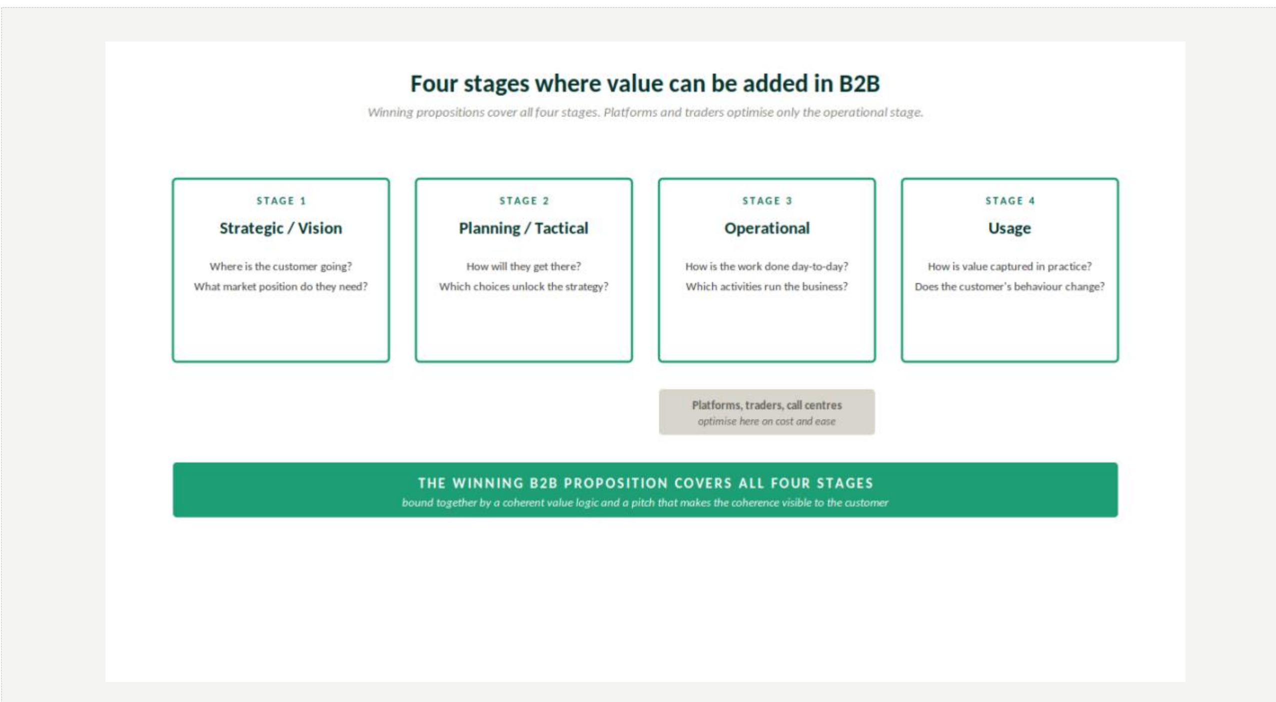
Designing across all five dimensions — and avoiding the buffet

A systemic proposition does not address one dimension; it is designed across all five — ROI, Risk and Resilience, Strategic, People, and Planet — at the level where each matters to the customer. But many suppliers in the research programme make a revealing mistake here. They believe that because they have products and services touching each dimension, they are offering systemic value. They are not. A spread of capabilities set out for the customer to assemble is a buffet, and the customer sees a long list of items, none of which explains why this supplier should be chosen over a more focused competitor for any single item.

Two things convert a buffet into a systemic value proposition. The first is a binding layer — a coherent value logic that joins the capabilities into a single super-value proposition, answering the question: why these capabilities, in this combination, for this customer? The second is a pitch — a structured way of making that logic visible. Suppliers consistently underestimate this. They assume that if the coherence is real, the customer will perceive it. Customers do not perceive coherence on their own; they hear individual claims unless the pitch shows them how the claims connect.

Designing across all four stages of the journey

Systemic value is also distributed across time. B2B value can be added at four stages of the customer's journey, and the systemic proposition covers all four. The first is strategic and visionary — where is the customer going, and what market position must they occupy in three to five years? The second is planning and tactical — which choices unlock the strategy? The third is operational — how is the work done day-to-day? The fourth is usage — does the customer's behaviour actually change, and are the people using the proposition using it correctly?



The four stages where B2B value can be added. Winning propositions cover all four. Platforms, traders, and call centres optimise only the operational stage. The binding layer joins the supplier's offering across all four stages; the pitch makes that coherence visible.

Platforms, traders, and call centres optimise the operational stage — they make the day-to-day transaction faster and cheaper. For purchases that genuinely belong in the commodity lane, that is the right value to compete on, and the supplier who tries to beat a platform there will usually lose. The systemic proposition competes elsewhere: it adds value at all four stages, bound together, and the customer buys the binding logic, not the individual components.

Two redesign cases

Robovision, the industrial AI firm founded by Jonathan Berte, illustrates the redesign at its sharpest. Jonathan stopped selling fixed AI solutions because the customers' use cases shift faster than fixed solutions can keep up. He now sells what he calls a LEGO box — a capability platform the customer's own operators configure as needs change. The proposition engages all four stages: strategic (where is the customer going in industrial AI?), planning (build versus buy?), operational (the platform and modules), and usage (ongoing reconfiguration). The binding layer is a capability, not fixed solution. Robovision did not learn to sell fixed solutions better; they stopped selling fixed solutions and started selling something else.

Colruyt Solucious, the foodservice-wholesale arm of one of Belgium's largest retail groups, illustrates the same move on the operational and strategic dimensions. As routine ordering migrates to e-commerce, the supplier's value can no longer rest on taking and filling orders — a platform does that faster and cheaper. The redesign reframes the proposition around lowering the customer's operational risk: helping a restaurant, a care home, or a public-sector kitchen run better, not merely supplying it. The systemic value lies in stabilising what the customer depends on — price predictability, supply continuity, assortment fit, and the operational know-how the customer cannot staff at their own scale — rather than in the transaction the platform already handles. The supplier who recognises this competes on system improvement; the supplier who does not is left defending the one stage, a platform will always win.

What Trend 2 requires. The supplier's second job is to **design**: to redesign the proposition so it improves the customer's whole system — across all five dimensions and all four stages — bound by a coherent value logic and made visible by a pitch. This is the **Value Design** pillar. A supplier who cannot redesign cannot compete for systemic value; they can only offer a buffet against competitors who can.

Trend 3 — From single buyer to aligned stakeholders: Systemic Selling

System-level transformation is never decided by one person. It requires multiple stakeholders, at different levels of the organisation, aligned behind the same case — a sub-value proposition for each, all carried by the one Systemic Business Case built in Trend 1, now distributed rather than re-argued.

THE SUPPLIER'S JOB: SELL — *align a coalition of stakeholders, each at the value dimension they own, behind one business case.*

A proposition designed to improve the customer's whole system touches the whole organisation — and so it can no longer be sold to one buyer. This is the third trend. System-level transformation is never decided by one person. As purchases become systemic, more functions acquire a vote: HR, sustainability, legal, IT, finance, operations — functions that historically had no say in supplier selection and now do. The coalition often stretches outside the customer too, to certification bodies, downstream offtakers, recycling partners, and regulators. Selling systemic value means aligning that coalition behind a single business case.

The market splits, and the middle hollows out

The B2B market is splitting into two lanes, a direction already documented in *From Selling to Co-Creating* (Lemmens and Marcos, 2014). On one side, anything that reduces to a clean transaction — known product, comparable specifications, single decision-maker, low switching cost — migrates to platforms, traders, and e-commerce. On the other, the high-value lane grows as customers need purchases that touch multiple departments and reshape how they operate. The middle — purchases neither fully commodity nor genuinely strategic — is hollowing out: too expensive to justify a salesperson, not strategic enough to justify the alignment cost of the high-value lane. Systemic selling is the discipline of the high-value lane.

Tendering — the procedural shape of a coalition decision

Eiso Bleeker, former head of the Sales Management Association in the Netherlands, watched the shift unfold across his membership. The association recently created an award for Tender Manager of the Year because tendering has become too central to ignore.

> *"Tendering is becoming more and more important. If you don't know how to do it well, you are completely out of business at the moment."*
> Eiso Bleeker, former director, Sales Management Association (Netherlands)

Tendering is not bureaucracy. It is the procedural shape a systemic decision takes once the buying coalition has expanded. The HR director, the finance lead, the legal counsel, the IT architect, the sustainability officer — none can be present in every supplier conversation, so the tender coordinates their criteria into a single decision. The salesperson who has not recognised this responds to tenders by competing on price. The salesperson who has works backwards from the tender to the criteria, and from the criteria to the stakeholders who shaped them — before the tender publishes.

One proposition, many pitches — stakeholder-specific sub-propositions

Selling to a coalition does not mean making different promises to different people. It means expressing one systemic business case in the language of each stakeholder's layer. Accent, the Belgian recruitment firm, illustrates the discipline: it carries a multi-stakeholder value proposition where procurement, operations, and HR each see their own layer of the case. Lien Byttebier describes an approach built on stakeholder-specific sub-value propositions. The finance and procurement view hears the proposition framed around financial impact: the cost of unfilled positions, the hidden costs of onboarding. The HR director hears it framed around process improvement: industry benchmarks, recruitment-cycle redesign. The operations head hears it framed around hiring-cycle reliability: time-to-fill, retention. These are not different offers. They are the same business case, distributed — each stakeholder shown the layer of value they own, not re-argued from scratch. The proposition is one. The pitches are many.

This is where the systemic business case from Trend 1 does its second job. Built once, it is now distributed rather than rebuilt for each conversation — each stakeholder shown the dimension they weigh most heavily, all tracing back to one coherent case. The supplier who cannot articulate strategic value cannot earn the alignment effort the coalition requires; the supplier who can align the coalition around a shared case operates in a commercial space with very few competitors.

What Trend 3 requires. The supplier's third job is to **sell** systemically: to align a coalition of stakeholders — each addressed at the value dimension they own, through a sub-value proposition — behind one systemic business case. This is the **Value Selling** pillar, and the Layered Business Case is its instrument: it operationalises the five dimensions in a live, multi-stakeholder conversation. Almost no supplier today presents a structured multi-dimensional business case to a full coalition. Those who build the capability now will be operating in 2030 conditions.

Trend 4 — From promise to guarantee: Systemic Value Success

Customers no longer accept promised value; they want assurance it will be captured. And here is the deeper shift: they no longer need salespeople to bring knowledge — that is available through systems and AI. What remains irreducibly human is aligning stakeholders behind a vision and driving the behavioural change adoption requires. The salesperson's value moves from informing the decision to guaranteeing the outcome.

> **THE SUPPLIER'S JOB: GUARANTEE** — *move from informing the decision to guaranteeing the outcome — the human work AI cannot do.*

The first three trends expand what the supplier must justify, design, and sell. The fourth names what makes any of it real at the customer site. Systemic value identified during the sale is only a promise. It becomes value only when the customer's system actually changes — when people start working differently and the designed improvement is captured. Increasingly, customers will not pay for the promise. They want the supplier co-accountable for the capture.

AI commoditises information; the premium moves to capture

AI completes a movement that began two decades ago. The internet ended the era of the talking brochure; social media accelerated the commoditisation of information; AI is finishing the job. Customers now use AI to compare solutions, draft requirements, and generate internal arguments. They no longer need salespeople to bring knowledge — that is available through systems and AI. The commercial value of human time has shifted away from information transfer toward what AI cannot do well: building trust across a buying group, translating between stakeholders who do not share a frame, and driving the behavioural change that converts a signed contract into captured value. The salesperson's value moves from informing the decision to guaranteeing the outcome.

Two moments where the human role is irreplaceable

The human role survives at two moments. The first is during the sale: aligning the coalition behind the proposition. The stakeholders from Trend 3 do not align themselves — each evaluates through their own frame. AI can help the supplier understand each stakeholder separately. AI cannot run the meeting where four stakeholders disagree and shift in real time as the conversation evolves. That work is fundamentally social.

Lien Byttebier at Accent describes the same shift from another angle. Accent's salespeople create value by challenging clients with proprietary data — industry benchmarks, hidden onboarding costs. The data is valuable, but what makes them hard to replace is the ability to express the same insight in the language of operations, of safety, of the CFO, or of the works council, depending on who is in the room. AI can generate four framings on demand. It cannot sit in the room with four stakeholders who disagree. The translation work is social, and it survives automation.

The second moment is after the sale: driving the behavioural change that captures value. A systemic proposition does not deliver value by itself — people at the customer have to work differently. Delaware, the IT consultancy, illustrates the discipline. The firm used to sell SAP modules; it now sells business outcomes with bonus-malus pricing, and a customer-success role it calls the labrador role keeps Delaware present through the change process.

> *"The problem is never the technology. It is the change process around it."*
>
> Bart Van Kerkhoven, Delaware, Commercial Lead

A SAP implementation that delivers value requires more than software: HR, finance, and operational processes all have to change. The supplier who delivers the software and walks away does not see the value captured. The supplier who is present through the change — and contractually accountable for the outcome — is operating at system level. Outcome-based pricing is the contractual form of co-accountability: it makes the supplier co-responsible for the success of the system's adoption and use.

Trust moves from before the sale to after it

Luc Jacobs, CEO of Nexus, describes a measurable change over the past dozen years. In 2012, eighty percent of his sales process required physical presence at the customer site; today the proportion is reversed. The capex-to-opex shift that moved IT spending from large discrete investments to subscription consumption moved trust-building out of the pre-sale phase and into the post-sale phase. The customer commits more frequently, with smaller decisions, but on the basis of a relationship built through experience of service. Pre-sale trust was built through demonstration and credibility. Post-sale trust is built through how the supplier behaves when something does not work — which is precisely where systemic value is either captured or lost.

What Trend 4 requires. The supplier's fourth job is to **guarantee**: to move from promising systemic value to assuring its capture, through co-accountability and the human work of stakeholder alignment and behavioural change. This is the **Value Capturing** pillar. Without it, the dimensions remain rhetoric. With it, they become outcomes — and the supplier earns the next deal because the first one was proven.

The Discipline — Value Engineering

Four trends, three pillars, one business case. What the demand for systemic value asks suppliers to become.

The four trends are not independent observations. They are one chain. Systemic risk produces demand for systemic value; systemic value must be justified (Trend 1), designed (Trend 2), sold (Trend 3), and guaranteed (Trend 4). Read as a job of work, the four trends resolve into a single commercial discipline — value engineering — built on three pillars, with one instrument binding them.

The trend / activity	The pillar it operationalises
Trend 1 · From moral claim to financial proof (Justify)	The Layered Business Case — the connective tissue running through all three pillars
Trend 2 · From local solution to system improvement (Design)	Value Design — redesign the proposition before the sale
Trend 3 · From single buyer to aligned stakeholders (Sell)	Value Selling — align the coalition during the sale
Trend 4 · From promise to guarantee (Guarantee)	Value Capturing — secure the outcome after the sale

Value selling has been understood as a sales discipline for decades. Value engineering treats selling as the middle of a three-stage commercial discipline that also includes proposition design before the sale and value capture after it — all carried by a systemic business case that makes the five dimensions of value financially defensible. The supplier who operates all three pillars at depth is doing something categorically different from the supplier who operates only at the selling pillar. That difference is the future of selling.

Diagnostic — Five Sets of Questions to Surface Systemic Value

A practical bridge from the trends to the methodology. Each set probes one dimension of systemic value, surfacing opportunities the current proposition is missing.

The five dimensions are also a diagnostic tool. The questions below are designed for sales leadership teams and key account managers in structured account reviews. Each is open, prompting a conversation with the customer rather than an answer from the supplier's existing knowledge. Used systematically, they surface opportunities the existing proposition is not capturing — and they populate the systemic business case across its five dimensions.

ROI — the economic value the customer captures

- Which costs is the customer currently bearing that our proposition could eliminate or substantially reduce — including costs they may not yet have quantified?
- Which revenue streams could our proposition unlock that the customer is not currently capturing?
- Where in the customer's operations is value being lost — through waste, inefficiency, or capability gaps — that we could help recover?
- How would a 10 percent improvement in the customer's most pressured KPI translate into financial terms, and can we credibly contribute to it?

Risk and Resilience — the risks the supplier can absorb

- Which volatility — price, supply, demand, regulatory — is the customer absorbing that we could absorb instead, through guarantees, contractual structure, or stock-holding?
- Where does the customer carry single-source risk that we could mitigate through geographic, technical, or operational redundancy?
- Which implementation risks does the customer face in deploying our proposition that we could absorb through outcome-based pricing or contractual accountability?
- What would happen to the customer's operations if a critical input or service we provide were unavailable for thirty days, and what would they pay to remove that scenario?

Strategic — the customer's market position and competitive advantage

- Where is the customer trying to go in the next three to five years, and which capabilities will they need that we could supply or develop with them?
- Which strategic threats does the customer face — new entrants, disruptive technologies, regulatory shifts — that our proposition could help them defend against?
- Which capability could we offer that the customer cannot easily build in-house and would prefer to access through partnership?
- How could our proposition give the customer a differentiated position in their own market that competitors cannot easily replicate?

People — the customer's workforce

- Where is the customer experiencing workforce pressure — recruitment difficulty, retention loss, productivity decline, wellbeing-related absence — that our proposition could relieve?
- Which roles are most strategically important and most vulnerable to talent loss, and could our proposition help retain or replace them?
- Is the customer's HR or wellbeing function trying to make the case for an investment we could support with data, frameworks, or business-case material they cannot easily produce alone?

- Which dimensions of employee experience — health, engagement, development, work-life integration — does leadership consider strategically important, and where could we contribute?

Planet — environmental impact and regulatory exposure

- Where does the customer carry environmental regulatory exposure — CSRD, CSDDD, EU Taxonomy, sector-specific rules — that our proposition could help reduce?
- Which parts of the customer's supply chain or operations carry the highest planetary-boundary exposure — emissions, water, biodiversity, novel entities — and could our proposition address them?
- Is the customer's cost of capital being affected by their ESG profile, and could our proposition improve the metrics their lenders and investors now score?
- Where could a regenerative redesign — moving beyond do-less-harm into actively positive impact — open a price window the risk-only frame would not unlock?

These twenty questions are prompts for structured conversations, not a checklist. A useful pattern is one account-review session per dimension, with the team preparing questions in advance and the customer engaged in a workshop or interview format. Not every question produces an opportunity. But across a portfolio, applied systematically, they surface systemic value the existing proposition is not capturing — and they begin the design work Trends 1, 2, and 3 argue is now necessary.

About the Authors

Prof. dr. Régis Lemmens is the founder of the Future of Selling research programme and a professor of B2B sales and value selling at Solvay Brussels School of Economics and Management and at AMS Antwerp Management School. He is the founder of Sales Cubes, a consulting firm that works with industrial, technology, and services clients across Europe on the operational implementation of the patterns described in this paper.

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A note on research method

The Future of Selling research programme is a multi-year, practitioner-grounded effort tracking how B2B sales is actually changing in firms across Europe. It draws on hundreds of in-depth interviews and structured workshops with B2B commercial leaders across industries; on consulting engagements where the patterns are tested in commercial reality; and on collaboration with academic partners (Solvay, AMS, Cranfield) and practitioner partners, including the Regenerative Marketing Institute (founded by Philip Kotler with Christian Sakker and Jef Teugels). The named cases in this paper are illustrations of patterns that recur across that wider research base.

Stay notified

To be notified of new research outputs, including the executive summary, the slide deck, and the Systemic Value Selling framework explainer, visit futureofselling.eu.

Contact

For executive education, or academic collaboration, contact the Future of Selling research programme via futureofselling.eu.