

THE INVISIBLE SHORTLIST

How industrial buyers decide who gets a sales meeting before sales ever gets involved.

Strategic brief · September 2026

The opportunity exists before it appears in your CRM.

94%

of B2B buyers had ranked their shortlist before speaking to sellers.

95%

bought from a vendor already on the Day One shortlist.

77%

the pre-contact favourite went on to win.

79%

buyer initiated first seller contact.

PROBLEM

RESEARCH

DISCOVERY

SHORTLIST

PREFERENCE

CONTACT

CRM

Most companies start measuring here
→

A company can lose a sale without receiving an RFQ, sending a quote, speaking to the buyer, or ever knowing the opportunity existed.

Selection first. Validation second.

61%

First seller contact now occurs around 61% through the buying journey.

SELECTION

- Define problem
- Identify suppliers
- Research
- Compare alternatives
- Shortlist
- Form preference

Mostly invisible to the supplier

VALIDATION

- Validate claims
- Test technical fit
- Understand trade-offs
- Negotiate
- Secure internal confidence
- Finalise decision

Visible commercial opportunity

Buyers are contacting sellers earlier than a year ago. The important caveat: the shortlist and preferred supplier are still usually established first.

AI makes research faster. It does not remove the need to verify.

69%

Technical buyers use GenAI somewhere in purchasing.

4.7 / 10

Average trust in GenAI answers.

67%

prefer a rep-free experience

70%

prefer digital self-service

69%

want salespeople to validate AI-generated information

51% GenAI · 49% sales representatives

94%

of 6sense buyers used LLMs somewhere in the purchase process.

Buyers are almost evenly split on where they expect misleading information to come from.

DISCOVERY IS BECOMING EASIER. TRUST IS BECOMING MORE EXPENSIVE.

An AI recommendation is the start of the investigation.

75% mostly or fully trust AI-generated vendor recommendations.



THE EVIDENCE ENVIRONMENT



COMMERCIAL DATA HYGIENE IS SALES HYGIENE.

What happens when the sources disagree?

WEBSITE

IP65

TECHNICAL PDF

IP66

DISTRIBUTOR

IP54

OLD PRESS RELEASE

IP65

SALESPERSON

"IP66 available"

WHICH ONE IS TRUE?

Modern search collapses channel inconsistency into one screen. McKinsey reports buyers now use an average of ten channels across a purchase journey.

A good product still has to cross a trust gap.

53%

brand familiarity influenced the most recent purchase

70%

prefer the better-known brand when technical options appear similar

34%

bought primarily on specs, pricing or performance

UNKNOWN SUPPLIER

ACCEPTABLE RISK

Specs

Certifications

Installed base

Applications

References

Engineer content

Familiarity is an advantage. Evidence is the route around it.

You are not selling to one person.

13

internal stakeholders

9

external influencers

73%

purchases involve 3+ departments

53%

procurement acts as decision-maker

Will it work?

Engineering / technical

Can we run it reliably?

Operations

Can this supplier deliver?

Procurement

Can the claims be documented?

Quality

Is the economics defensible?

Finance

Is the supplier credible?

Management

Can regulatory requirements be proven?

Compliance / sustainability

These concerns overlap. Different participants can want contradictory things at the same time.

The buyer wants sales later - and better.

LOW-VALUE SALES WORK

- Introducing the company
- Reading the brochure
- Repeating specifications
- Sending generic catalogues
- Answering information already online

HIGH-VALUE SALES WORK

- Interpreting context
- Resolving uncertainty
- Comparing trade-offs
- Quantifying impact
- Navigating internal disagreement
- Helping the buyer defend the decision
- Reducing perceived risk

BEFORE CONTACT

The company sells.

AFTER CONTACT

The salesperson interprets.

INFORMATION IS CHEAP. JUDGMENT IS NOT.

The Invisible Shortlist operating model.

- 1 DISCOVERABILITY** Can the right buyer find us?
- 2 LEGIBILITY** Can they understand us quickly?
- 3 EVIDENCE** Can we prove the claims?
- 4 CONSISTENCY** Does every channel agree?
- 5 PREFERENCE** Why should we rank above the alternative?
- 6 VALIDATION** Can sales resolve what remains?

This is Kickoff's synthesis of the research - not a framework directly tested in any single study.

Would you make your own shortlist?

	MARK ONE		
	YES	PARTLY	NO
Visible before the buyer knows our name?	☐	☐	☐
Strongest applications clear in two minutes?	☐	☐	☐
Specifications consistent everywhere?	☐	☐	☐
Project references easy to find?	☐	☐	☐
Certifications current and visible?	☐	☐	☐
Technical content answers real questions?	☐	☐	☐
Independent evidence exists?	☐	☐	☐
Content serves multiple buying roles?	☐	☐	☐
Sales knows what the buyer likely knows?	☐	☐	☐
Win/loss reasons are captured?	☐	☐	☐

8-10 YES

Strong pre-sales environment.

5-7 YES

Credible, with gaps.

0-4 YES

Upstream commercial problem.

THE FIRST SALES MEETING MAY HAPPEN WITHOUT YOU.*The commercial system still has to win it.*