

## 10 Problems Facing Technical Presales in 2026 & Beyond the Simple Fix

As we start 2026, it's time for a candid conversation about what's holding you back from closing more pipe, and how to solve these issues beyond the simple fix.

Whether you're the Head of Presales watching your team drown, the Sales Director wondering why deals are stalling, or the Presales Engineer who just spent another weekend rescuing a proposal - this is for you.

### #1. Presales & Sales Misalignment on Deal Qualification

Your sales team sees opportunity everywhere. Your presales team sees calendars filled with unqualified tire-kickers and 'educational' sessions that will never convert.

The disconnect isn't just frustrating - it's expensive.

When your presales engineers are dragged into every early-stage conversation because sales 'needs technical credibility,' you're burning your most valuable resource on unqualified opportunities.

Do the math: what percentage of presales time typically goes to deals that shouldn't have been pursued? Industry data shows 30-50% is common ([The PreSales Collective](#)). But even just 10% represents millions in potential opportunity cost annually.

What's worse, unqualified deals inflates the pipeline, adds noise to forecast accuracy, and creates a vicious cycle where management demands more activity to compensate for poor conversion rates.

#### Beyond the Simple Fix:

The quick fix is to simply add extra qualification fields into the CRM. But while this enforces process compliance, it doesn't create the cultural shift and operational rigor required to turn qualification into a strategic advantage. Without sales teams understanding the 'why', qualification is just another 'admin' checkbox exercise to complete, and no deal is ever truly deprioritized.

High-performing teams don't just implement qualification frameworks (whether it is BANT, MEDDIC, or something else) - they embed *strategic focus* into their cultural DNA. Leaders consistently model tough prioritization decisions and reinforce why focus beats chasing everything.

High-performing teams make their qualification frameworks 'real' with concrete scenarios, decision trees, and examples to anchor pipeline debates. Nuanced trade-

offs between deal size, strategic value, and resource investment are captured. When sales says 'this is a Tier 2 opportunity,' presales knows exactly what discovery has been completed, what resources and urgency are justified, and what the expected conversion rate should be.

#### **Quick Glossary:**

- BANT (Budget, Authority, Need, Timeline)
- MEDDIC (Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, and Champion)

Also see [\*Problems in Pipeline Qualification & Prioritization - Your Diagnostic Questionnaire\*](#).

## **#2. The Sales-to-Presales Handshake Gap**

The handoff from sales to presales *should* be a precision relay pass. Instead, it's more like a game of a game of broken telephone.

Your presales engineers spend evenings doing forensic analysis on CRM notes, email threads, and call recordings. The solution is rushed and it's too late to validate with the customer. Deals lack basic technical context that should have been clarified in early conversations.

It's not just frustrating for your team - visible internal misalignment erodes customer confidence.

#### **Beyond the Simple Fix:**

While checklists help, the long term opportunity is to raise the technical baseline across sales teams. With sales enabled to conduct more substantive discovery conversations, presales engagement becomes more strategic.

The handoff shifts from 'customer wants to talk technical stuff' to 'we need you to design the target state architecture.'

High-performing teams structure the buyer journey so every step makes sense to the customer, *then* optimize for how sales and presales operate behind the scenes. The 'fidelity' of the technical solution increases in depth with each interaction. The handoff isn't a handoff - it's progression to the next level of engagement.

## **#3. The Presales Burnout Epidemic - From 'Everything to Everyone'**

Picture this: It's 9 PM on a Thursday. Your senior presales engineer is simultaneously juggling three RFP responses, fixing tomorrow's demo environment, and responding to panicked texts from sales about a 'quick question' that will take two hours to properly answer.

Your presales team has become the Swiss Army knife of the organization: context-switching between tasks, buried in shadow work, and constantly firefighting to keep deals alive. Despite this, they're still often perceived as bottlenecks.

Each person walking out the door costs at least \$150,000 in replacement and ramp time ([Performio](#)). But that's just what shows up in the budget. Consider the lost momentum when a trusted architect exits mid-cycle? The institutional knowledge that walks out the door? The customer relationships that need rebuilding?

### **Beyond the Simple Fix:**

The obvious answer is 'hire more people.' But throwing headcount at the problem misses the root problems.

Organizations need to protect presales capacity like the strategic asset it is. They need to build operating models around that capacity and maximize expertise utilization. This means tighter qualification and prioritization, defined sales-presales ways of working, and investment in capturing institutional knowledge.

Depending on your team's scale, you may also want to consider shifting away from the simplistic X:X sales-to-presales ratio mentality. Instead of hiring based on some magic 4:1 or 6:1 number, consider analyzing 'presales activity distribution' and building specialist roles (or champions). For example, demo engineers for repeatable demonstrations, technical writers for proposals, and value engineers for business modelling.

### **#4. The Impossible Trade-Off: Speed vs. Quality**

Sales needs the proposal by Friday. It's Wednesday afternoon, and the technical validation call hasn't happened yet.

Instincts will shout: 'We can't accurately size infrastructure without understanding workloads. If we rush this, it could create problems down the line.'

Finding the right balance between speed vs. quality is not easy - there are no hard guidelines. But teams often underestimate the power of 'first response advantage'. While this will vary case by case, research suggests that 78% of B2B customers end up buying from the vendor that responds first ([6sense](#)).

Consider this scenario: while Provider A is working toward a comprehensive, fully validated proposal, Provider B has already sent a high level solution overviews within 24 hours. These solutions aren't perfect or properly sized, but directionally accurate and enough for the customer executive to begin socializing internally.

It's about winning customer trust and mindshare.

### **Beyond the Simple Fix:**

What if the answer isn't choosing between speed and quality - but reframing the problem entirely?

Teams can invest in 'Solution Accelerators' or pre-validated reference architectures for common scenarios, allowing faster responses without cutting corners (*also see [Problem #10 - Knowledge Systems](#)*).

Teams can also design 'progressive precision' into their buyers' journeys - drilling down in detail toward a customer-validated solution and providing value at each interaction.

Within 24 hours, aim to provide a 'high-level discussion document' of 3-5 pages that demonstrates understanding of the customer's problem, outlines a technical approach, presents alternative options, and includes rough order of magnitude (ROM) sizing.

This isn't the final answer - it's the beginning of a dialogue. You're positioning yourself as thought partners who can move at the customer's pace. The detailed, validated proposal still comes, but it arrives after establishing credibility and momentum.

Also see [Problems in Solution Design & Proposal Development - Your Diagnostic Questionnaire](#).

## **#5. Selling Outcomes, Not Features**

A customer asks for backup storage. Provider A delivers a comprehensive technical response - RPO, RTO, IOPS metrics, all specifications validated, every requirement carefully mapped. The proposal is 47 pages of technical excellence. Provider B takes a different approach: a sharp 8-page response focused on business resilience, regulatory compliance, and operational risk.

Both responses are technically sound, but positioned completely differently.

The significance of this often emerges later in the customer relationship. When additional customer needs surface - cloud tiering, analytics capabilities, disaster recovery orchestration - the provider who established themselves as a strategic advisor expands the engagement. On the other hand, the provider who led with technical specifications may find themselves competing on features and price for each subsequent opportunity.

This pattern reveals a deeper challenge: many presales teams are exceptionally skilled at explaining *what* technology does, but have less opportunity to develop the muscle around articulating *why* it matters or uncovering the broader business problems customers are trying to solve.

### **Beyond the Simple Fix:**

This isn't solved with a one-day workshop on 'value selling' - it's a 6-12 month cultural journey requiring systematic training and leadership backing to uplift presales from technical translators into business value architects.

The shift will reveal itself in how deals get discussed. Key features get anchored to outcomes: 'This isn't immutable backups - it's your insurance policy against a \$5M ransomware payment.' Technical capabilities translate the metrics that keep executives awake at night: enterprise risk scores, product launch timelines, operational cost ratios. Proposals don't just answer today's requirements; they paint a picture of tomorrow's possibilities through Future State Roadmaps.

Also see [Customer Objectives & Priorities - What Do They Actually Want?](#)

## **#6. Vendor Expert Bottlenecks & Cycle Time Bloat**

The RFP looked straightforward: Cisco UCS compute, Dell switches, and NetApp ONTAP storage. But the Cisco architect is tied up on another RFP, the Dell team takes 3 days to check firmware compatibility, and the NetApp engineer is on vacation. By the time all the experts align, you're two weeks into what should have been a 48 hour response.

The cruel irony: the more successful you become, the more complex the deals, the more vendors involved, and the worse this gets. Each vendor specialist is supporting 20+ other partners just like you. And you can't just hire specialists for every technology either - good presales engineers are hard to come by, expensive, and the landscape changes too fast.

### **Beyond the Simple Fix:**

Expertise bottlenecks are arguably the hardest problem to solve. There's no silver bullet, but certainly multiple levers to pull.

High-performing teams map vendor certifications to revenue opportunities, investing strategically where it matters most. They make internal knowledge visible through structured sharing, so the team's first instinct is 'who's done this before?' not 'which vendor should we call?' (also see [Problem #10 - Knowledge Systems](#)).

But what if expertise mattered less than adaptability?

Consider building a few confident generalists in your team who are skilled at using AI to close knowledge gaps. This not only relieves some external vendor reliance, but gives your team the agility to expand into new domain territory. The insight is recognizing that the differentiator to winning deals isn't perfect expertise - it's 'intelligent velocity'.

## **#7. Separating the Innovation Signal from Noise**

The innovation treadmill never stops - but not everything on it deserves equal attention.

Your presales team faces two distinct challenges that often get conflated. First, there are the *real* technology shifts - the ones that fundamentally change how enterprises operate. Cloud transformation. Containerization. Zero trust architecture. This is innovation you don't want to miss.

Then there's marketing-driven vendor innovation. One could call these 'solutions looking for problems'. Every vendor release brings a stream of 'game-changing technologies', along with existing features that have been rebranded as 'AI-enabled.'

When you tell your team to 'keep pace with innovation,' is there clarity on what is actually worth pursuing?

There are two main ways to grow - find more customers, or deepen your footprint with existing ones. When you can separate vendor hype from genuine innovation, you become the advisor they call before making strategic decisions. When you can't, you become just another reseller amplifying vendor messaging.

Your real competitive advantage isn't knowing every feature - it's knowing which ones matter.

### **Beyond the Simple Fix:**

High-performing teams have developed the judgment to 'time the market'. They track what customers actually buy, not what vendors are selling.

They practice strategic ignorance or use an 'innovation filter': Will this drive deal velocity? Will customers pay for it? Will it matter in 12 months? If not, give it conversational competence (e.g., by running monthly 'Tech Radar Sessions'), rather than certification-level attention.

If genuine technology shifts emerge, sharp leaders move decisively. They assign their best engineers to become early experts, then use them to elevate the rest of the team. They secure vendor commitment for technical enablement beyond the sales deck. Upskilling in these domains becomes protected time, and measured like any other critical business activity.

## **#8. New/Junior Talent Sink or Swim (Mostly Sink)**

Growing junior talent is one of the most effective ways to build sustainable, reliable presales capacity. But most organizations lack the structured time and systems to make it work - seniors are too buried to mentor, so development ends up ad hoc.

This impacts experienced new joiners too. They spend months deciphering your methodology, your customer base, and the unwritten rules of how deals really get done.

The 'revolving door' of talent is not just a presales capacity problem - it impacts team morale and is a recurring cost of at least \$150,000 per exit ([Performio](#)).

### **Beyond the Simple Fix:**

Most onboarding and development programs exist in PowerPoint decks and good intentions. High-performing organizations don't leave development to chance - they build operating models where apprenticeship is structural.

Leadership doesn't just approve development programs; they protect them, measure them, and participate in them. Junior and experienced new talent are deliberately paired with seniors on live deals, learning methodology through real engagements instead of hoping for mentorship moments that never materialize.

Professional development becomes a system, not just a separate program. Monthly 'Tech Radar Sessions' and 'Deal Showcase Sessions' embed continuous learning into the operating rhythm. 'Solution Libraries' turn past wins into assets for juniors and new joiners (see Problem #10 - Knowledge Systems). Ramp-time metrics create accountability - tracked, discussed, and optimized like any other critical KPI.

## **#9. Presales Not Recognized as a Revenue Driver**

While some organizations have genuinely elevated presales to strategic status, for others the structural signals reveal the truth. Sales operates on 50/50 commission splits while presales receives 5% bonuses. Sales reports directly to the CRO; presales sits under operations or engineering. Even social budgets tell a story here.

The irony? Your presales engineers are often your most effective salespeople. They build customer trust through technical credibility. They uncover needs and possibilities that sales conversations alone would not surface.

They're shaping deals worth tens of millions - yet they themselves often feel like the support function rather than the revenue engine - which is far from the case. [McKinsey](#) analysis suggests presales activities have 2-3× more impact on revenue than lead generation, yet presales typically receives only 30-50% of the investment those lead-generation functions get.

### **Beyond the Simple Fix:**

This isn't about fighting for a bigger slice of the compensation pie. It's about fundamentally repositioning how the organization views presales.

High-performing organizations recognize presales as a strategic revenue engine, and have shifted their operating structure to enable this. Variable compensation that rewards revenue impact. Leadership roles that influence strategy. Metrics that showcase presales ROI at board level.

In these high-performing organizations, presales leaders shape go-to-market strategy alongside sales leadership, and have executive sponsors who secure multi-year investments in presales tools, training, and talent acquisition.

### **#10. Knowledge Lives in Heads, Not Systems**

Your best presales engineer spent three days architecting a brilliant solution for a financial services client. Six months later, a colleague is working through the same problem from scratch - unaware the solution already exists. When the customer asks, 'Have you done this before?', the team searches through old emails and Slack threads, trying to prove you have.

[IDC](#) and [McKinsey](#) estimate that knowledge workers lose about a full day each week just looking for information - and often still don't find what they need.

It's a vicious cycle: when everyone's busy, documentation feels like overhead rather than an investment. It's also a costly shortcut: effort duplicated across deals, new hires struggling to ramp without institutional memory to learn from, and hard-won expertise that remains locked in individual experience rather than becoming organizational capability.

If your most experienced presales engineers moved on tomorrow, how much institutional knowledge would you need to rebuild?

### **Beyond the Simple Fix:**

High-performing teams treat tribal knowledge or 'Solution Libraries' as strategic IP, not just nice-to-have documentation. They make knowledge capture part of the deal rhythm rather than an afterthought.

Post-deal debriefs become standard practice, not optional. Within days of significant wins or complex losses, teams document repeatable architecture patterns and capture what actually worked (or didn't) on the ground. This isn't about creating comprehensive documentation for its own sake - it's about making the next deal faster and more confident.



Looking ahead, AI-powered tools will accelerate this shift - automatically tagging, indexing, and surfacing relevant solutions at the moment of need. While these capabilities are still maturing, forward-thinking organizations are already building the habits and structures that will make them valuable.

The benefit compounds - with every deal captured, your team's starting point improves. What takes two weeks this quarter might take two days next quarter (also see Problem #4 - Speed vs. Quality).

What separates high performers today becomes table stakes tomorrow.

Also see [\*Problems in Sales Engine Foundations \(Data, Operating Model, & People Enablement\) - Your Diagnostic Questionnaire\*](#).

### **The Path Forward: Structural Change, Not Quick Fixes**

These ten problems aren't just operational headaches - they're existential threats to your competitive position. As deals get more complex, cycles get shorter, and margins get thinner, the organizations that solve these presales challenges will be the ones that close more pipe.

The fix isn't incremental. It's structural.

This means:

- Compensation models that reward value creation, not just deal support
- Systems thinking that treats sales-presales collaboration as one revenue engine
- Investments in technology and data capabilities that automate the mundane and amplify your strategic capacity

The question isn't whether you can afford to transform your presales function. It's whether you can afford not to.

What's the challenge that keeps you up at night? Join the conversation about rewriting the playbook for technical sales.