



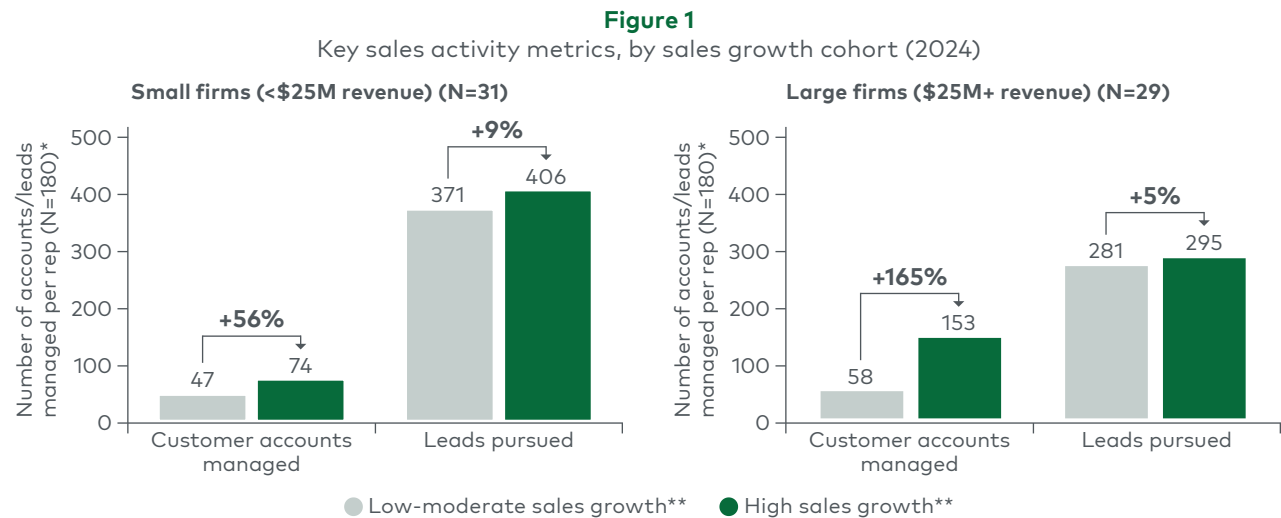
EXECUTIVE INSIGHTS

Commercial Excellence: 3 Insights for AEC and HVAC Services and Distribution Leaders

Within building and infrastructure services, commercial excellence is how teams turn day-to-day activity into steady growth. To separate signal from noise, L.E.K. Consulting surveyed and interviewed U.S. sales executives and frontline sellers across heating, ventilation and air conditioning (HVAC) distribution, HVAC commercial services, and architecture, engineering and construction (AEC) firms. Three insights stood out, along with practical implications for leaders.

1. High-growth organizations deepen, rather than dilute, their customer mix and focus on productivity

High-growth firms (defined as those with growth at or greater than 15% annually) reflect a similar balance between new and existing customer contributions. However, while the source of growth looks the same, execution makes the difference. Teams that spend time on the right prospects, strip out low-value tasks and follow up consistently generate greater revenue as a result (see Figure 1).



*Survey questions: How many customer accounts do you currently manage? On average, how many leads do you manage per year? How much, if at all, did your sales grow last year (2024 compared to 2023)?

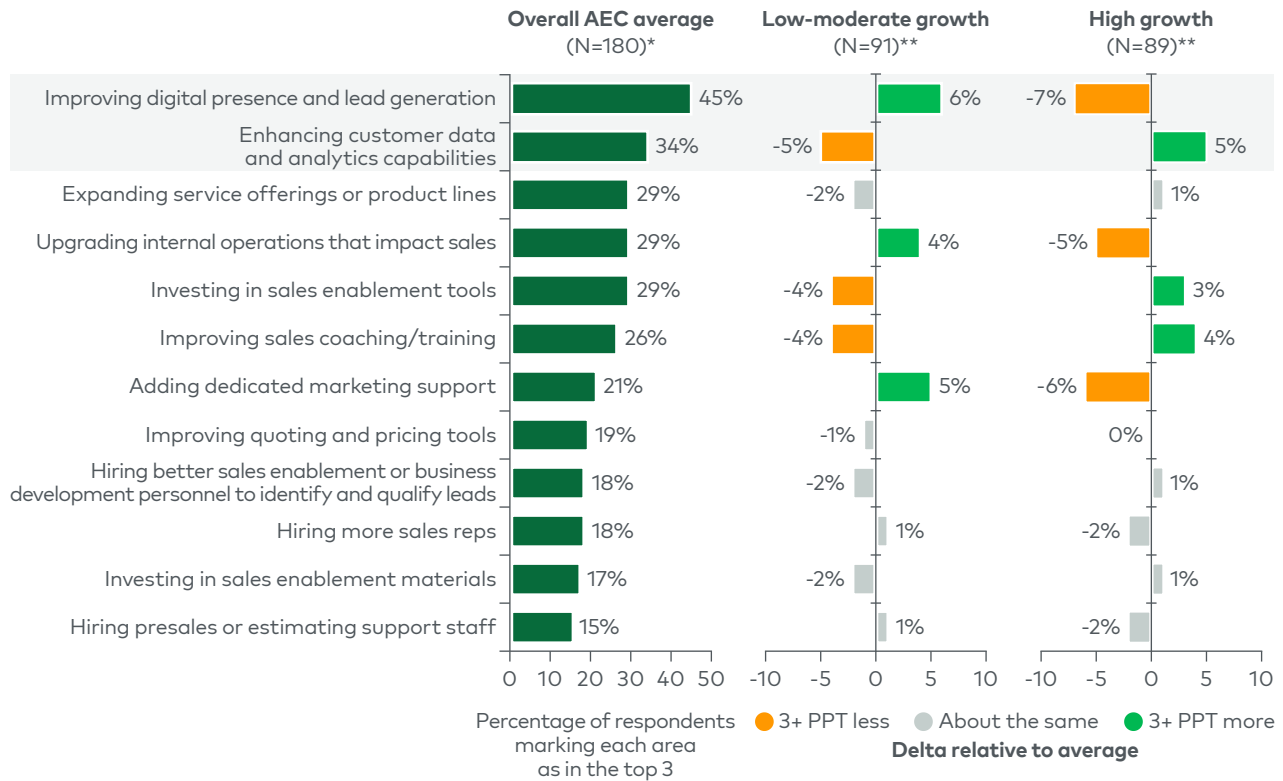
**High sales growth defined as 15% or more; low-moderate sales growth defined as less than 15%

Source: L.E.K. research and analysis

Productivity sets the pace. High-growth companies manage more accounts and more leads per rep. They invest in capabilities that raise conversion and help sellers focus on the next best action. Teams use analytics to identify and rank opportunities, then apply training, coaching and enablement so sellers spend more time selling and less time searching. Leaders also devote less time to internal process upgrades that do not directly support sales performance. As a result, coverage widens, focus tightens and movement through the funnel becomes more predictable (see Figure 2).

Figure 2

All companies: Most successful/highest ROI areas for growing sales over the past three years, by growth performance cohort (2025)



*Survey question: Of the below investment areas for growing your organization's sales, which have been the most successful/provided the highest ROI over the last three years? (Please select up to three options in order of importance)

**High sales growth defined as 15% or more; low-moderate sales growth defined as less than 15%

Note: ROI=return on investment; PPT=percentage point

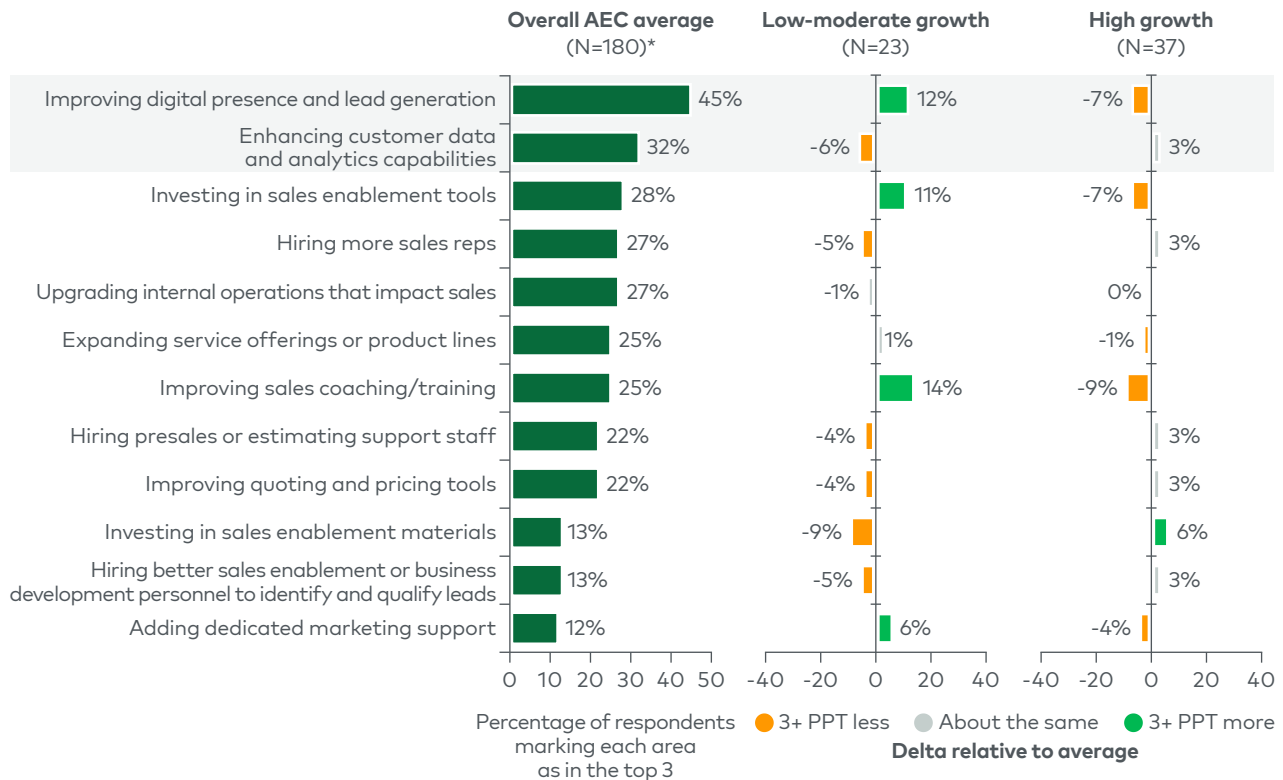
Source: L.E.K. research and analysis

These dynamics show up in the data. Enablement, analytics and fewer internal distractions link to stronger representative capacity and better lead handling across the pipeline. Analytics points to where to work, while enablement makes the work easier to execute.

The pattern repeats across categories. Even with differences by sector that reflect sales models and resource choices, the theme holds. When teams cover more ground without losing quality, growth rates improve and the mix between new and existing customers stays steady (see Figure 3).

Figure 3

AEC firms: Most successful/highest ROI areas for growing sales over the past three years (2025)



*Survey question: Of the below investment areas for growing your organization's sales, which have been the most successful/provided the highest ROI over the last three years? (Please select up to three options in order of importance)

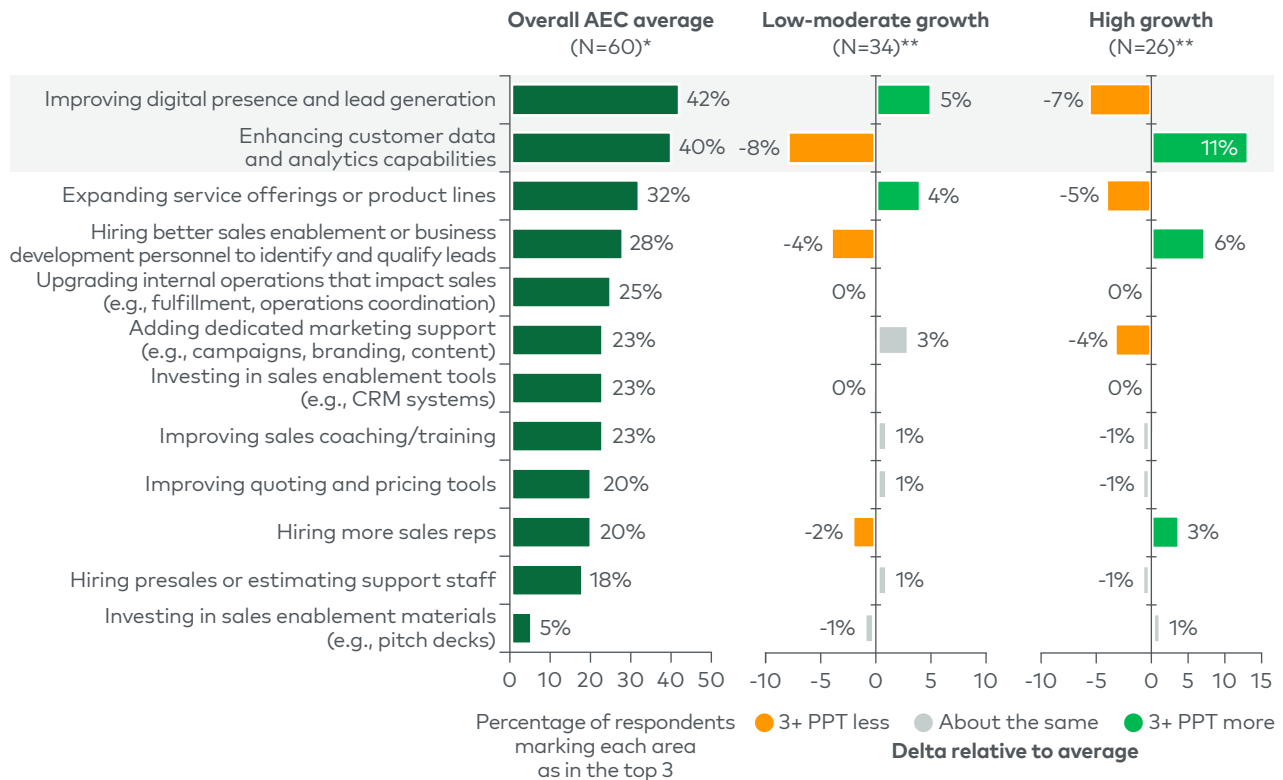
Note: AEC=architecture, engineering and construction; ROI=return on investment; PPT=percentage point

Source: L.E.K. research and analysis

HVAC distribution. Data analytics and sales enablement are important. Higher-growth distributors also highlight hiring additional salespeople, which supports broader coverage and faster response when quality leads surface. Adding head count sits alongside analytics and enablement rather than replacing them (see Figure 4).

Figure 4

HVAC distribution: Anticipated best use of funds for growing sales over the next three years (2025)



*Survey question: Of the below investment areas for growing your organization's sales, which do you believe are the best use of funds/offer the highest potential ROI over the next three years? (Please select up to three options in order of importance)

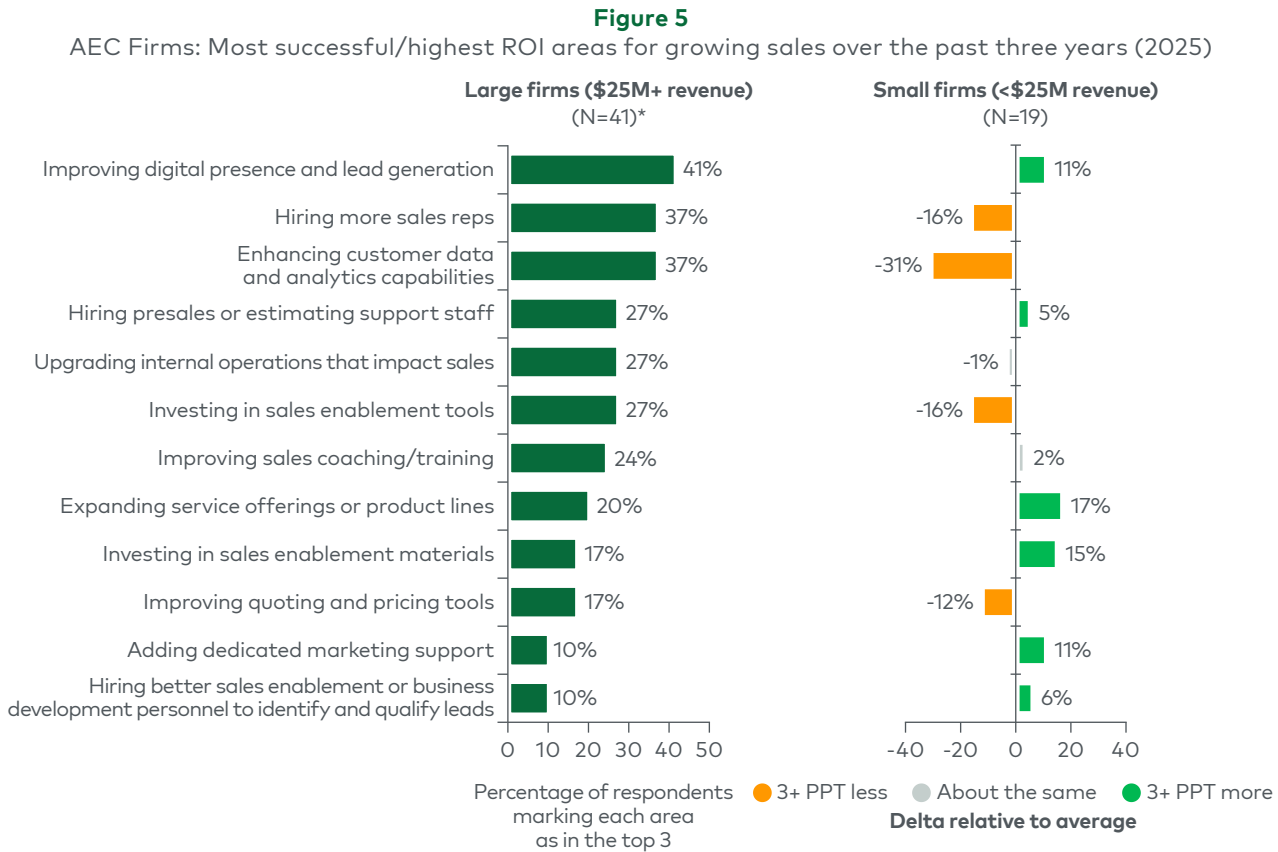
**High sales growth defined as 15% or more; low-moderate sales growth defined as less than 15%

Note: HVAC=heating, ventilation and air conditioning; CRM=customer relationship management; PPT=percentage point

Source: L.E.K. research and analysis

HVAC commercial services. Analytics and enablement matter here as well. Leaders also emphasize hiring more salespeople and expanding product lines with supporting marketing. Expansion often reflects a broader service scope — for example, more electrical. HVAC and the broader MEP portfolio include a larger number of services that can be more complex than in many other categories, so clear communication helps customers see where the provider can help and when to engage.

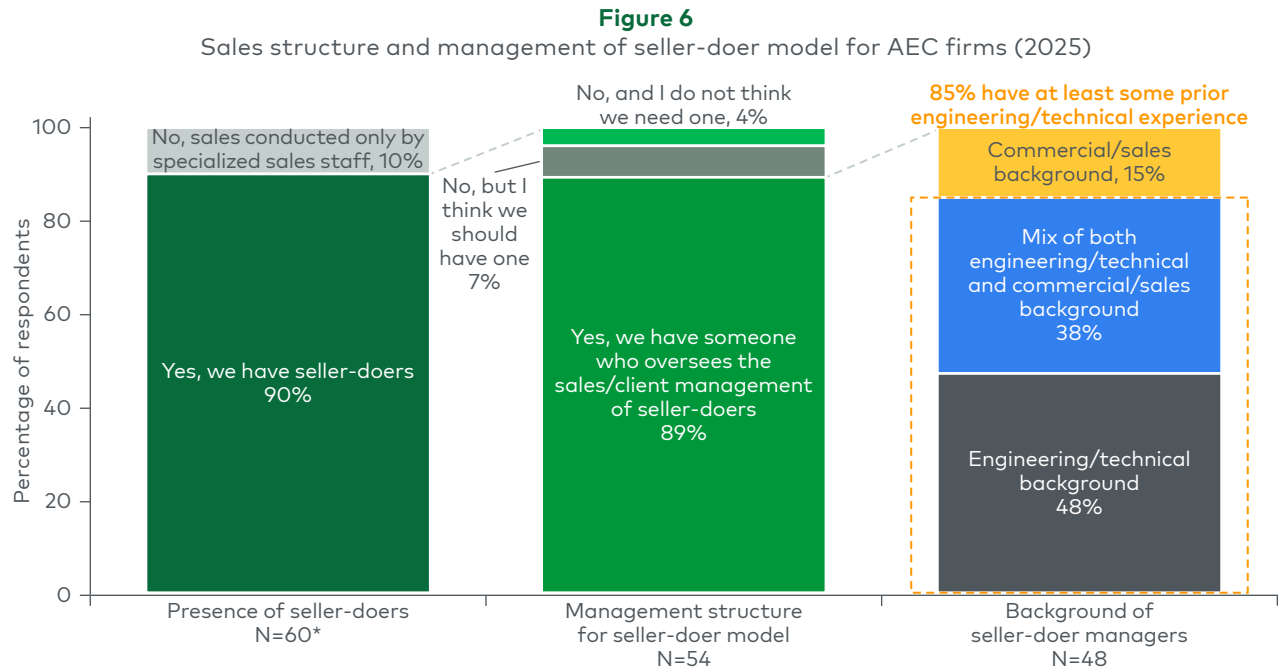
AEC firms. Data and digital analytics are key differentiators. Sales enablement is less prominent because many AEC firms use a "seller-doer" model, in which technical practitioners both deliver and sell. Size differences are meaningful. Compared with large firms, small firms place much less emphasis on adding sales reps or investing in customer data and analytics. Emphasis on these disciplines positions larger firms for the longer term (see Figure 5).



*Survey question: Of the below investment areas for growing your organization's sales, which have been the most successful/provided the highest ROI over the last three years? (Please select up to three options in order of importance)
Note: AEC=architecture, engineering and construction; ROI=return on investment
Source: L.E.K. research and analysis

Sales resources in AEC are often led by managers with engineering or technical backgrounds, which shapes how teams adopt analytics and business development processes and how seller-doers are supported (see Figure 6).

Success ties to the capacity to work more accounts and more leads. Better tools and analytics enable that capacity. Depending on the industry and the company setting, expanding the service offering and the number of sales reps may also be required.



*Survey questions: Does your organization include seller-doers, i.e., professionals who are involved in project execution (e.g., engineers, consultants) and the sales process (e.g., significant involvement in prospecting, proposal writing, quoting, bids)? You indicated that your sales organization includes seller-doers (e.g., consultants, engineers who are also involved in the sales process). Does your organization have a professional to manage/oversee the sales performance and client management of these seller-doers? You indicated that your organization has a professional/professionals to manage/oversee the sales performance and client management of your organization's seller-doers. Which of the below best describes the background/qualifications of the person who manages/oversees your organization's seller-doers?

Note: AEC=architecture, engineering and construction

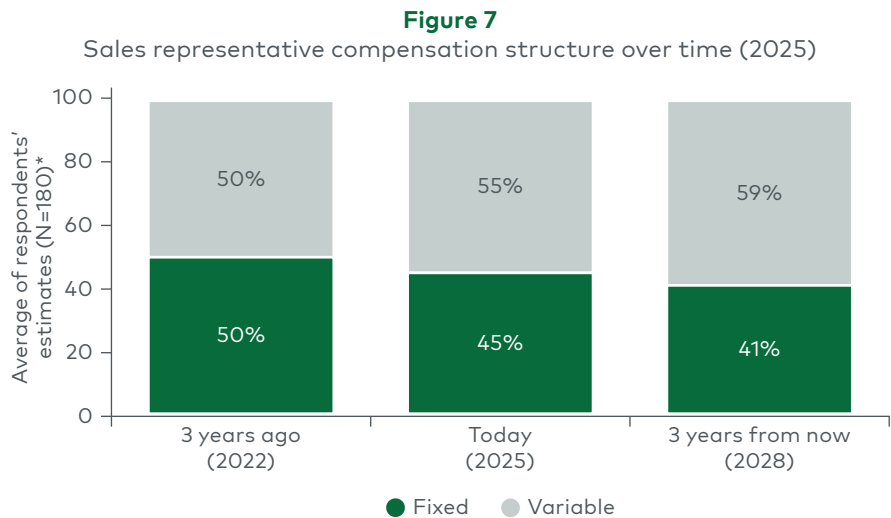
Source: L.E.K. research and analysis

2. Variable-heavy pay structures are accelerating

Companies are shifting compensation toward performance-based pay. Across all segments, fixed pay as a share of total compensation declined from 50% in 2022 to 45% in 2025 (see Figure 7). It is expected to slide to 41% by 2028. HVAC distributors are moving fastest. By 2028, 66% of compensation is expected to be variable. The trajectory points to a steady increase in the portion of pay tied to measurable results as organizations refine plan mechanics and clarify performance expectations.

Sales compensation structures are expected to keep shifting toward variable pay over the next three years, with respondents projecting a steady increase in the share tied to performance-based incentives. The aim is tighter alignment between sales incentives and outcomes as organizations emphasize growth, accountability and results-driven performance. In many cases, plans are being adjusted so effort, outcomes and pay are more visibly connected within the field.

Companies should direct more commission upside to the behaviors that matter most. Priorities include digital lead stewardship, AI adoption and strong data hygiene. Organizations should also maintain enough base pay to retain talent during slower cycles, so teams remain stable and ready to respond when demand strengthens.



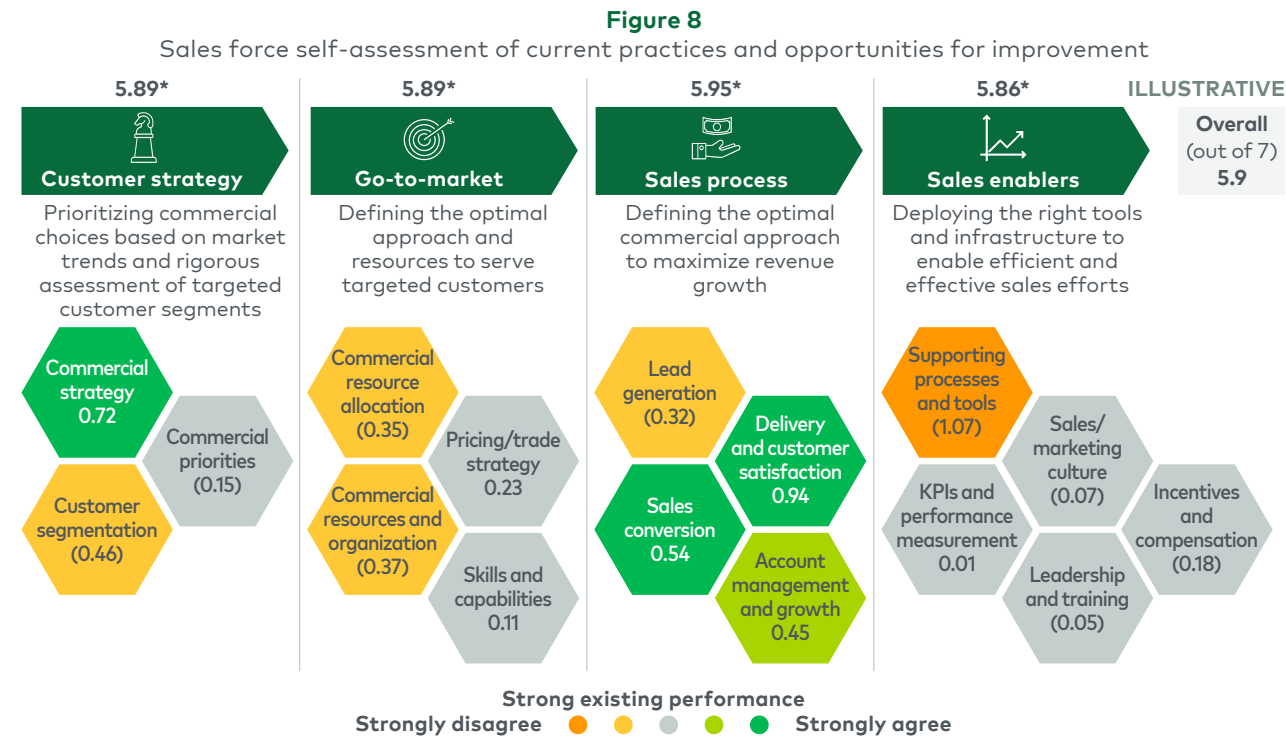
*Survey questions: What percentage of average frontline sales rep's compensation is fixed (e.g., salary) vs. variable (e.g., commission) today? How was that split different three years ago? How do you expect that split to be different three years from now? Which of the below best describes how average frontline sales rep feels regarding the split between fixed and variable compensation?
Source: L.E.K. research and analysis

3. Industry sales teams highlight significant room for improvement in sophistication of customer segmentation, organization of commercial resources and deployment, lead generation, and supporting processes and tools

We asked sales teams and sales leaders across HVAC distribution, HVAC commercial services and AEC firms to rate their organizations' commercial capabilities. The results signal significant room for improvement, especially around commercial team design, deployment, and providing stronger support around targeting and lead flow so sellers can spend more time with customers.

Across companies, the sales force is asking for more central support. Priority areas are customer segmentation, resource allocation, lead generation, and the processes and tools that connect these activities. Results vary by industry, but the message is consistent: Sharper targeting, better leads and smoother workflows help the frontline operate at a higher level. When support functions provide cleaner data and clearer handoffs, sellers can spend more time with customers and less time on administration, which reinforces the productivity focus described above. (See Figure 8).

Outside of these broad themes across companies, we saw divergence in the data among respondents: Many companies had a particular "blind spot" in their overall support that can be a distracting gap for the sales force.



Note: Numbers represent average score; KPIs=key performance indicators
Source: L.E.K. research and analysis

Our Commercial Fitness Assessment Survey helps organizations benchmark performance against market averages and focus attention where it matters. Even when sales force effectiveness is generally strong, it is important to identify gaps and their root causes, and then address them in a deliberate sequence, so improvements directly enhance conversion or coverage.

Implications

Commercial excellence in the built environment is not about adding more feet on the street. Progress depends on smarter digital funnels, data-driven prioritization and rewards tied to performance. With that in mind, leaders should gauge the voice of the frontline at a regular cadence to surface bottlenecks and support gaps, and then turn those insights into targeted enablement and marketing support.

Leaders should focus on sales enablement, including tools and training supported by powerful analytics, and on hiring better sales enablement or business development personnel to identify and qualify leads, so representatives can manage more opportunities without harming the customer experience. In some instances, companies may need to hire more representatives to support activity. Compensation design should align pay with outcomes by reflecting the growing role of variable pay and directing the strongest upside to the behaviors that sustain growth.

For more information, please [contact us](#).

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