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The Overview Presentation

Why It May Be Killing Your Sales

Your company may sell products, it may sell services or it may even sell solutions. It certainly doesn't sell high level overviews or a 50,000 ft view of its capabilities and market position. Yet how many Sales Engineer hours, and customer hours, are wasted on overview presentations of "*who we are and what we do*" which ineffectively sell nothing?

Why is that? Because your customer is not interested in you and your story until you have shown that you can help them. As a former CIO, no vendor ever walked into my office unless I already knew who they were and what they did! I'll look at how and why overview sales calls are set up, and then detail a few reasons why they are usually a bad idea.

The number one offender is the fishing expedition. Which is the call set up because someone at the customer site wants to know more about your company and what you sell. This implies there has been minimal discovery and no definition of the customer's business issue and pain. Among the more cynical and experienced SE's this is known as the "*stop me when you see something you like*" pitch. There is nothing positive about this situation that I can think of, unless you get very lucky.

A second common situation is when you are working on a deal and the ultimate signer/approver wants to know what her team is spending her money on, plus get an idea of any project you can assist on. This may sound like great executive exposure, except that it should have happened weeks before. Why? Because executives love to leave their fingerprints on each project. Whatever proposal or architecture you have designed will be changed - so be prepared.

Other standard overview scenarios are the industry seminar or user group, the partner or consultant introduction and multiple other situations when either you or the audience are unsure of what the outcome of the presentation will be. On those occasions when neither of you are sure of the outcome - good luck!

So why is the overview a bad idea - either for you or your company?

1. **It positions you as a generalist** rather than being an expert in any particular subject. Yet if you work for a company with a large and diverse portfolio and you can actually make sense of all of it and link it all together - that's a skill that salespeople love.
2. **The overview is usually boring.** When you just scratch the surface you'll bore everyone but the beginners or totally uninformed. You will need to provide some detail in at least one area relevant to your subject matter.
3. **It is totally forgettable.** How many overview presentations can you recall even after a few weeks? The material just isn't going to be very inspirational or motivational and unlikely to be very educational. You have to inject the spark and attract attention - and that's hard work.
4. **There is no stand-out message.** By covering a dozen topics or products very briefly you will go wide, but not deep. Unfortunately people remember deep and not wide. Teachers are told it's better to cover topics in depth at the expense of not teaching all parts of the curriculum. Test scores back that up. So pick a residual message that everyone can remember.
5. **It's abstract.** There is little in the presentation that relates directly to your audience. It's easier when presenting to a mass audience at a seminar than to a single customer. Without a "what this specifically means to you" section there is nothing concrete and nothing memorable.

There must be another way. Before your next overview presentation, ask yourself if there is an alternative to deliver part of the material. Can you send an analyst report, a white paper or a video to stimulate curiosity and make the overview more focused? So what else can you do? Well, you can force a discovery call beforehand. Try telling some user stories, provide examples and provide some take-away facts. When someone leaves your talk and says "did you know.." to a colleague - that's a success. Then limit the PowerPoint and get your audience talking. Eliminate some topics and focus on others.

When forced into giving an overview presentation - don't just think about education. Think about curiosity. You need to leave the audience wanting to learn more. Because when they learn more they will spend more.

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