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The Post Sales Puzzle

Pre-Sales. Post-Sales and No-Sales

Sales are busy selling. Services and Partners won't help unless they get paid. Support is doing the best they can but they are understaffed, and Engineering won't prioritize a product fix without a hundred pages of business justifications. So who does look after the customer when they have a problem?

The answer is usually "*you do*". Whenever there is a capability gap within a company invariably the Pre-Sales Engineering team steps up to be the organization of last resort. That is especially true in customer care and follow-up situations. So let's examine the pluses and minuses of Pre-Sales engaging in Post-Sales activity, and why it happens in the first place.

Some Basic Assumptions

I'll make a few assumptions up front. Firstly that you are engaged in some form of relationship selling as opposed to transactional sales. Which really comes down to (i) are you expecting more revenue from the same customer at a later date and (ii) do you have any form of stake in the customer being successful? Secondly that post-sales is not in your job description or in your compensation plan (for example a bonus based upon customer satisfaction or "burning down" existing product the customer has already acquired.) The final assumption is that you are not tied to a single major account (like AT&T or GE in the USA).

Why Not Mix Pre and Post Sales Activities Together?

Here's the problem – the two functions don't mix organizationally, culturally or behaviorally. No matter if you are an individual or an executive charged with both functions. Post-sales activity will eventually expand to consume all available time and resources and will drag your pre-sales team down into the mud. This doesn't make sales too happy – they may be content to let other people take care of their customers until it affects their ability to obtain pre-sales help for the next important sales call. Never forget pre-sales primary job is to help sales sell, not to keep the customer happy.

How Much Post-Sales Activity Is Too Much?

My general guideline is between 4 and 8% of an SE's time should be spent on post-sales activities – say 2 hours per week. It's also something that needs to be monitored on a monthly basis by operations or pre-sales management so that trends can be established. If your organization has SE time tracking this is a "good" statistic to get from the system as it allows pre-sales management to lean on other parts of the organization if the numbers are out of line in any area. If there is no time tracking, pick a 2-week time period at random and have the SE team record time spent.

What Causes High Post-Sales Activity (and how can I fix it?)

1. A Poor Handoff To Services. Ideally the Services or Partner team should be engaged with the customer before the contract is signed. Yet many organizations frown upon this as it is not billable hours, or they mess around with complicated cross-charges. Regardless, there needs to be a formal hand-off from sales to services which covers what you sold (what the customer thinks they bought), all documentation, RFP responses, architecture diagrams, presentations and demos. A good risk assessment of issues in implementation, including politics, is invaluable. The handoff is a necessity – if you don't do this then you are begging for trouble in failed implementations, missed customer expectations and intra-company finger pointing.

2. A Poor Product. If your product has not been designed or implemented to the highest quality there will of course be problems. Some are to be expected, but bugs or flaws in key areas cause the majority of customer issues. The customer then turns to the sales team and demands action to get his problems resolved. The tracking of these issues and the internal/external communication required can just consume your time. As an SE you cannot fix the product, but you can help the customer by appropriately escalating their issue. Better yet, they should know how to escalate themselves.

3. Poor Response From Support. When the customer calls support and can never get an answer/never get past level 1/never get any updates/never get to the right person who do they turn to? You. This is another case of setting up a handover call – but this time between support and the customer. As soon as the transaction is signed, ensure

that support/customer care explains the support and escalation process. You don't want to be in the middle of this although it is tempting to pitch in and help. Remember that support gets 15-25% maintenance fees every year so let them earn their money. I am constantly amazed by the number of companies who never have a 'welcome" call with a new customer.

This also brings up the First Responder Rule. When a customer is in trouble they will scatter-shot calls into the entire organization based upon who they know. When you, as an SE, choose to be consistently the first to respond you are enabling other parts of the company to be inefficient and you are conditioning the customer to always call you. Think carefully!

4. Poor Training. When budgets are squeezed the first thing to go is the training and services component. I did this as a CIO in a prior life. Any time you hear "*take 50,000 out of the training budget line item, we've got smart people and they can figure it out*" that's a precursor to trouble. As an SE, one of your unwritten duties is to ensure that the correct amount of training and services are attached to every deal. This is particularly true when working with a Partner or in a multi-vendor, joint-bid situation. Most compensation plans pay more for the product/license component than for services and training – where do you expect the quote to get trimmed?

5. Poor Selling. Yes it happens! You (the sales team) sold the customer something that didn't quite fit, or you glossed over some product deficiency or perhaps you really didn't understand what the customer really wanted. If it is an honest mistake then you should invest time to fix it. If you knowingly allowed the contract to be signed then you need to look yourself in the mirror and question your ethics.

As an SE How Do I Prioritize My Post-Sales Activities

Almost every sales organization divides their accounts into A, B and C categories – get this list for the territory you cover. As a best practice you should have this already. Then focus your time on the "A's", ignore the "C's" and fight about the "B's" – and finally match the accounts to the quarterly short-term and to the long-range forecasts. If a rep has forecast a deal at an account where another division or department has post-sales issues then there is justification for your involvement. If there is nothing on the forecast then you (or your boss) should question the activity. I used to ask first or second-line sales management to prioritize post-sales in the context of pre-sales activities. (i.e: "which is more important – should Steve do that product presentation to

AT&T on Monday or do you want him to hunt down a license key and spare parts for Exxon?")

What Are The Positives of SE's Doing Post-Sales?

1. Real Life Wisdom. You get to see how "your stuff" is implemented and used in the real world.

2. References. Post-sales activities, in times of trouble or not, can lead to solid technical "go-to" references. Not the kind you see on a Corporate PowerPoint, but the kind who will take a phone call from your prospect and say good things.

3. Build A Network. You're not just in this for your company. Fixing people's problems is a great way to build out your personal network for the future.

4. You Provide Continuity. On average, the tenure of the SE organization at a company is twice that of sales. When the salesperson changes (yet again) you are the continuity on the account. It pays dividends. Early in my career I visited the same account for four years with 9 different reps. When we needed a big favor to get an end of quarter deal guess who went to pick up the contract?

5. You Set Boundaries. I always told my favored post-sales accounts that although they could call or email me, my job was to be in front of other customers helping the sales guy sell something. So I would guarantee them a response in 24 hours, but noted that other parts of the organization could get back to them much quicker.

Try The Math

Figure out what your personal time-based quota is. Suppose you support two reps full-time whose combined quota is 6 million Euros. Divide that by 2,000 which is the number of hours in a business year. That gives you 3,000 per hour. Multiply by 8 and round up to get a daily rate and that's 25,000 Euros per day. Is what you are doing today worth 25,000 to the company?

Summary

Some Post-Sales activity is good, as long as it benefits you, the customer and your company. If Pre-Sales is the organization of last resort because other departments are failing the customer then you (Ok – your management) needs to decide at what point to step aside and let others feel the customer's pain. All the benefits of happy customers, references and successful implementations need to translate into follow-on revenue. And by that I mean in the next 6 months, not 24 months in the future. If you spend too much time in Post-Sales, then you'll turn a Pre-Sales Engineer into a No-Sales Engineer.

"Your Customers Will Get Better When You Do"

Anon

Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at www.masteringtechnicalsales.com.

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