



## Mastering Technical Sales

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*John Care, Managing Director*

## The Quarter Just Finished: Now What?

### Twelve Ideas for the Pre-Sales Engineer

Many of you reading this column will be breathing a sigh of relief as yet another quarter is over. For a few it's the end of the fiscal year and for most it's the end of what was probably a tough Q1. Of course there are others at companies like Oracle, CA or HP who run on an off-month reporting calendar just to confuse purchasing departments.

So no matter when your quarter ends - what should you do? What actions can you take to improve yourself and your company's prospects? This is the time when most salesreps disappear for a few days to hold meetings on the golf course, and mid to senior level management busy themselves for a barrage of quarterly business and pipeline reviews over the coming weeks. This is an oasis in the constant demands on your time - so here are twelve ideas to make the most of it.

1. **Take some time for yourself and your loved ones.** Yes this really should be your first priority - especially if you've been travelling or working 16 hours a day on some Proof Of Concept or RFP. Take your spouse/loved ones/family out for a meal or to the movies, go watch your kid's sports game or concert. Then take care of yourself - dentist, doctor, optician, visit the gym etc. Recharge the batteries.
2. **Network with some sales guys.** Spend some time with the salespeople who aren't on the golf course. It really helps your career to have the reps in your corner when you need something from your boss or from the company. Offer to help them put together a strategy plan or territory plan over a coffee or beer in preparation for the inevitable forecast review they'll soon be going through.
3. **Visit some customers.** Go visit a local customer and offer your #1 contact lunch. Just tell them you're checking in on them and want to learn a little bit more about how they really use your product/solution/service. You may leave with a few to-do's

to call product support in return for invaluable real-world practical knowledge you can use in your very next sales call. It's a great deal.

4. **Buy lunch for a partner.** The partner ecosystem of most companies is usually fairly volatile and full of conflicts. Don't aim for a major partner, but go for one of the local boutiques with whom your company has some business. Meet with their 'techie people' and a business development person - they'll value the opportunity to spend time with you and learn something new. Almost every partner organization is judged by 'contacts' and "who they know".
5. **Cleanup your laptop and take a backup.** Some days I feel that my laptop is my best friend - it's an invaluable part of my business. Take care of it - clean it up a little, delete any unwanted programs, clean up the desktop icons, remove temporary files and all those other preventative maintenance things. And - take a backup! Even if your company automatically backs up your email you should backup everything else. Once a quarter isn't good enough but it's a start.
6. **Empty your inbox and categorize your email.** In the same vein, take control of your email! Empty out your inbox by responding, filing or deleting (gasp!) anything in there. If you are one of those "*I have 15,000 emails in my inbox and can find anything with the fast index search facility*" people it's time to repent your sins and get organized.
7. **Catch Up On Some Training.** Yep - one of the things about being in presales is that you usually have some mandatory or at least highly recommend training you need to take online. Get it over with, and take some of next quarter's requirements too. See point #12 for scheduling some face to face training in three months.
8. **Conduct Your Personal QBR.** Write up your own personal Quarterly Business Review. List your accomplishments, three things that went well, three things that didn't go so well, three things you need from your boss/the company and three things you are going to get done this coming quarter. Assess your achievements year to date and map them back to whatever you have in your annual goals and performance review statement. That's how you get a raise and it's a big part of getting promoted.
9. **Predict The Future.** This is more of a fun task. Sit down, look at the deals you are working on - and predict which ones you think are going to close; actually write

them down for the record. Also look at your product/solution portfolio, your competitors, and possible acquisitions to take your best guess as to what will happen with business in the next three months.

10. **Install/Use/Build Something.** Marketers call this "eating your own dog food"; I prefer to think of it as "drinking your own champagne". Try using your own product(s) to get something done that's useful for you. Depending on your industry this may be tough - but give it a try.
11. **Brush Up Your Soft Skills.** Take some of the feedback you've received over the past quarter to heart and practice your presentation or demonstration delivery. Try something new by injecting some other form of media or experimenting with a novel way of getting your message across. (Well - you could always hire me).
12. **Plan Ahead for the Next End of Quarter.** Think about what you can schedule for the first few weeks of July (or whenever the next quarter starts) and do it now. Book your training, schedule a vacation day, and talk to your boss about getting everyone together for a team meeting.

## **And In Summary**

Maximize the down-time at the start of each quarter. Plan for it and use it. Use it to recover your energy, use it to improve your skills, and use it to reconnect with friends and family.

"You will never "find" time for anything. If you want time, you must make it."

*Charles Bruxton , English philanthropist.*

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](http://www.masteringtechnicalsales.com).

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