

Mastering Technical Sales

The Sales Engineer's Handbook

Second Edition

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Mastering Technical Sales

The Sales Engineer's Handbook

Second Edition

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10 9 8 7 6 5 4 3 2 1

Contents

Acknowledgments	<i>xvii</i>
1 Introduction: Why Study “Technical Sales”?	1
New SE	4
Experienced SE	5
Sales Manager or Sales Trainer	5
Sales Representative	6
Marketing and Product Management	6
Technical Consultant	6
2 An Overview of the Sales Process	7
Definition of the Market	8
Marketing Campaigns	8
<i>Customer Events</i>	9
<i>Trade Shows and Seminars</i>	9
<i>Mailing Lists and Outbound Calling Campaigns</i>	9
<i>Partners</i>	9
Lead Qualification	10
Request for Proposal	10
Needs Analysis, Discovery, and First Customer Engagement	11
Presentation, Demonstration, and Proposal	11
<i>Presentation</i>	11
<i>Demonstration</i>	12
<i>Proposal</i>	12
Evaluation (Optional)	12
Negotiations: Close or Lose—Getting the Deal	12

Postsales Support and Ongoing Account Management	13
Summary	13
3 Lead Qualification	17
You Can Get Leads Too	19
Lead Quality	19
<i>Lead Ratings</i>	19
<i>Qualification Criteria</i>	20
<i>Acute Organizational Pain Can Trump Budget, Time Frame, and Fit</i>	23
Effective Lead Qualification	23
<i>Competitive Implications of Technical Qualification Criteria</i>	23
<i>Making the Decision to Say No</i>	24
<i>Defending Your Position When the Sales Rep Disagrees</i>	24
<i>Low-Cost Fallback Strategies</i>	24
Internal Roles in the Lead Qualification Process	25
<i>Sales Representative</i>	25
<i>Telemarketer/Lead Development</i>	26
<i>Sales Management</i>	26
<i>SE</i>	26
<i>Care and Feeding of the Telemarketing Team</i>	27
Lead Qualification in Action: The Process with Three Common Scenarios	27
<i>Solicited Leads</i>	27
<i>Unsolicited Leads</i>	28
<i>Current Projects or Recommended Leads</i>	28
Summary	29
4 The RFP Process	31
Creation of an RFP	31
Basic Rule of RFPs	32
The Go/No-Go Decision	33
Internally Scoring the RFP	34
Handling Deadlines	35
Strategies for Avoiding an RFP	36
The Alternate Response Tactic	37
Completing the RFP	38
Presentation and Follow-Up	39
Summary	40
Appendix 4A	42

5 Needs Analysis and Discovery	43
Overview	43
Why Discovery Is Critical	44
The Seven-Step Needs Analysis Approach	45
<i>Step 1: Identify Needed Information</i>	45
<i>Step 2: Build the Perfect Pitch</i>	48
<i>Step 3: Explain the Needs Analysis Process</i>	50
<i>Step 4: Interview Key Customers</i>	52
<i>Step 5: Observe Current Processes—Get to Know the End User</i>	54
<i>Step 6: Synthesize Information</i>	54
<i>Step 7: Prepare and Present Summary</i>	55
<i>Wrap-Up</i>	56
Customizing the Discovery Process	57
<i>Getting the Economics Right</i>	57
<i>Adapt Your Questions to Your Audience</i>	58
Summary	60
6 Successful Customer Engagement	61
First Contact	62
<i>Remember What They Want from You</i>	63
<i>Dissecting Project Dynamics</i>	64
<i>Back the Strongest Faction</i>	64
Identify the People You Need to Know	65
<i>Use Your Intuition</i>	65
<i>But Don't Forget to Use Your Brain</i>	65
<i>Covering the Whole Team, Including the Minor Players</i>	66
Coaches	66
<i>Where to Find Coaches</i>	68
<i>What If There Are No Obvious Options?</i>	68
<i>How to Get to Potential Coaches</i>	68
<i>Developing the Coach</i>	69
<i>The Unconscious Coach</i>	69
<i>Maintaining the Relationship</i>	69
Credibility	70
<i>Maintaining Credibility</i>	70
<i>Losing Credibility</i>	71
<i>Trying to Regain Credibility</i>	71
Know What You Don't Know	71
Summary	72

7 The Perfect Pitch	73
Developing a Focused Message	74
<i>Start with the Structure</i>	74
<i>Do a Data Dump to Identify Solution and Proof Points</i>	75
<i>Organize the Ideas</i>	76
<i>Focus the Message</i>	76
<i>Transfer to PowerPoint</i>	76
Nonverbal Delivery Skills	77
Verbal Delivery Skills	79
<i>Strategize the Start</i>	81
Special Situations	82
<i>Very Large Audiences</i>	82
<i>Presenting Via Teleconference</i>	83
<i>Around the Conference Room Table</i>	83
<i>Feature and Function Presentations</i>	84
<i>Using Humor</i>	84
Using Nervous Energy to Your Advantage	84
Finish Strongly	86
Summary	86
8 The Dash to Demo	89
Why Does the Dash to Demo Occur?	91
“The Product” Becomes “The Solution”	91
Risk Mitigation	92
Failing to Plan Is Planning to Fail	92
Logistical Implications	94
The Agenda	96
Preparing the Way	96
The Audience	98
<i>Segment the Audience</i>	99
<i>Dealing with Technical and Business Audiences</i>	99
Checkpoint Charlie	100
Summary	101
Appendix 8A: Sample Agenda	102
9 Snap Demos	105
Scoping the Snap Demo	106
Structuring the Snap Demo	107
Exhibit 9.1: Sample Snap Demo Structure	107
Keep the Demo Snappy	108

Wrapping the Snap Demo (Tell Them What They Saw)	109
Snap Demos for Executive Audiences	109
Closing the Demo and Establishing Next Steps	110
Snap Demo Considerations	110
Summary	110
10 Remote Demonstrations and Webcasts	113
The Basic Premise	113
Advantages and Disadvantages of the Remote Demonstration	114
Best Practices in Preparing for a Webcast	116
The First 3 Minutes are Critical	118
Effectively Constructing and Delivering PowerPoint for a Webcast	119
Some Really Bad Habits to Avoid	120
Engaging the Audience	121
Prime Time for Webcasts	121
The Wrap-Up	122
Summary	123
11 Evaluation Strategies	125
Developing the Strategy	125
<i>Conducting an Evaluation: How Did We Get Here?</i>	125
<i>Negotiating Engagement in a Trial</i>	126
<i>How Do You Define Success?</i>	127
How to Win: Determining the Success Criteria	127
<i>How to Ensure Success: Evaluating the Success Criteria</i>	128
<i>Intellectually Closing the Deal</i>	129
<i>Working Backward from the Definition of Success</i>	130
Running a Trial	130
<i>Trial Phases</i>	130
<i>Basic Trial Organization</i>	134
<i>Training</i>	136
<i>Documentation</i>	136
<i>Equipment</i>	137
<i>Networking and Access</i>	138
Anticipate and Outdeliver Your Competitor	138
Avoiding a Trial	139
<i>Does the Customer Do Trials?</i>	140
<i>Are They Paying for the Pilot?</i>	140
<i>Using References</i>	141
Summary	141

12 Contract Negotiation and Pricing	143
An Introductory Approach	144
Creative Ways to Say Nothing	145
Understanding the Quote	145
An Advanced Tactic	145
Summary	146
13 Sanity After the Sale	149
Developing the Transition Plan	150
Ongoing Engagement Plan	151
Customer Meetings: Project Kickoff	151
<i>During Deployment</i>	151
<i>After Rollout</i>	151
Leveraging the Rest of the Sales Team	153
<i>The Inside Sales Team</i>	153
<i>Executives</i>	153
Having a Fallback Strategy	153
Personal Benefits of Postsales Support	153
<i>Personal References</i>	154
<i>Maintain Relationships for Add-On Sales</i>	155
<i>Keep Your Reservoir of Customer Stories Full</i>	155
<i>Potential for Customer Satisfaction Objectives</i>	155
<i>Good Way to Build Skills</i>	156
<i>Benefit to the Customer: Free Consulting</i>	156
<i>Justifying Engagement with Your Management</i>	156
<i>Where to Draw the Line</i>	156
Troubleshooting the Handoff	157
<i>Major Accounts Have Special Requirements</i>	157
<i>Customer Skimps on Training</i>	158
<i>Customer Tries to Do It Themselves</i>	158
<i>Working With System Integrators</i>	159
Summary	159
Appendix 13A: Record-Keeping Forms for Postsales Information	161
14 Getting Started	163
The Ramp Process	163
<i>Setting Goals with Your Manager</i>	164
<i>Find Out What You Need to Know to Succeed</i>	164
<i>Boot Camp</i>	166

<i>Why Use Benchmarking?</i>	166
Develop a 30-/90-/180-Day Plan	167
<i>Example Plan 1</i>	168
<i>Example Plan 2</i>	169
<i>The 30-/90-/180-Day Structure</i>	169
<i>Qualities of a Good Plan</i>	170
<i>Ready to Go</i>	170
Tips on Making the First 6 Months a Success	171
<i>Find a Mentor</i>	171
<i>Read the Manual—Really!</i>	172
<i>Watch the Video</i>	172
<i>Master the Technology</i>	172
<i>Master the Product</i>	172
<i>Boot Camp Training Contacts</i>	173
<i>Work in the Factory</i>	173
<i>Face Time and Relationships</i>	173
<i>Practice, Practice, Practice</i>	173
<i>Learn About Key Customers and How They Actually Use Your Product</i>	174
<i>Understand the Financials of Your Value Proposition</i>	174
<i>Learn the Math; Don't Just Memorize the Answers</i>	174
<i>Understand Content, but Don't Feel Overwhelmed</i>	175
<i>If You Can Use Your Product in Everyday Life, Do So</i>	175
<i>Get Feedback—from Everyone</i>	175
<i>Review Your Plan Weekly</i>	175
Summary	176
15 Objection Handling	177
Before You Start	177
Categorizing Objections	178
<i>A Valid Objection</i>	178
<i>A Competitive Objection</i>	178
<i>The Seymour Objection</i>	179
<i>The Coaching Objection</i>	180
<i>The Hostile Objection</i>	181
<i>The Generic Objection</i>	183
Basic Techniques of Objection Handling	183
<i>Basic Technique 1: Listen</i>	183
<i>Basic Technique 2: Coordinate</i>	184

<i>Basic Technique 3: Clarify</i>	184
<i>Basic Technique 4: Restate</i>	184
<i>Basic Technique 5: Answer</i>	185
Working With Consultants	186
Follow Up Leads to Closeout	186
Summary	186
16 The Executive Connection	189
What They Think of You	189
Keep It Simple	190
Plan the Meeting	191
<i>Setting the Stage</i>	191
<i>Following the Dollars</i>	192
<i>Determining the Goal of the Meeting</i>	193
<i>You Are the Expert</i>	193
Execute the Meeting	194
<i>Education Versus Selling</i>	194
<i>Presentation Ideas</i>	194
<i>Presentation Technique</i>	195
Follow Up After the Meeting	196
<i>Building a Relationship</i>	196
<i>A Rational Decision</i>	196
The Informal Executive Connection	196
Summary	198
17 The U in Technical Sales	199
Me, Myself, and I	200
What Are Your Goals?	200
Your Personal Value Proposition: Self-Branding	201
<i>Internal Branding</i>	202
<i>External Branding</i>	202
<i>Communicating Your Personal Value Proposition</i>	203
Delivering on Your Value Proposition	204
<i>Put Together the Plan</i>	204
<i>Put Your Plan Into Action</i>	204
<i>Career Progression and the PVP</i>	206
<i>Benchmarking</i>	206
Ethics in Sales	207
Summary	208

18 Selling with Partners	209
Partnership Defined	209
Defining Account Ownership	211
Working the Relationship and Building the Infrastructure	213
The Dangers of Dealing with Partners	215
Summary	217
19 Competitive Tactics	219
Identify the Competition	220
Develop a Competitive Strategy	220
Know Thine Enemy	222
The Art of Competitive Analysis	224
“Tell Me About Your Competition”	224
Using Product Benchmarks	227
Summary	228
20 Using the CRM/SFA System	229
Why CRM Is Your Best Friend	230
<i>Time and Resource Prioritization</i>	232
<i>The Art of Repeatability</i>	233
Gain Advantage by Tapping Organizational Knowledge	233
Look at the Numbers	235
<i>Annual Review Time</i>	235
Summary	236
21 Crossing Over to the Dark Side	239
What Is Your Motivation?	239
Positioning for the Change	240
What You Should Expect	242
How to Make It All Work	243
Summary	245
22 The Hybrid Sales Specialist Position	247
The New Role of the Account Manager	248
Introducing the Hybrid Technical-Sales Position	248
Parallel Sales Forces	249
Complexities of the PSR Model	253
<i>Compensation</i>	253
<i>Communication</i>	254
<i>Cross-Selling</i>	255
Summary	256

23 Organizational Structure	257
Structure	258
<i>Structure 1: Separate SE Structure</i>	259
<i>Structure 2: Strong Branch Management</i>	260
Roles in the SE Organization	261
<i>Training</i>	261
<i>Demonstration Preparation</i>	261
<i>Bid Support</i>	262
<i>Mentoring and Skills Development</i>	262
<i>Motivation</i>	263
<i>Product Expertise</i>	263
<i>Point of Escalation/General Management Support</i>	263
Review of Sales Support Functions	264
<i>SE Manager</i>	264
<i>Trainer</i>	264
<i>Lead SEs</i>	265
<i>Infrastructure Support Groups</i>	266
<i>Overlay Sales/Market Executives</i>	266
<i>Field Marketing</i>	267
Advanced Topics: Five Models for SE Organizations	267
<i>Ratios: 2 to 1 or 1 to 1</i>	268
<i>Model 1: A New Organization—Five SEs and \$0 to \$20 Million in Annual Sales</i>	268
<i>Model 2: Getting Off the Ground—20 to 30 SEs and \$50 to \$100 Million in Annual Sales</i>	269
<i>Model 3: Economies or Diseconomies of Scale—100 to 200 SEs and \$350 Million in Annual Sales</i>	270
<i>Model 4: Over \$500 Million in Annual Sales—Splitting the Business Unit</i>	271
<i>Model 5: Differences in the SaaS SE Organization</i>	272
<i>Making the Models Work in the Real World</i>	272
Summary	273
24 Building the Infrastructure	275
A Little Philosophy	276
Training Techniques	277
<i>Initial Corporate Training</i>	277
<i>Initial Technical Training</i>	278
<i>Follow-Up/Update Training</i>	279
Demonstration and Equipment Support	280

Knowledge Management and Retention	281
<i>Key Requirements for a Simple Knowledge Management System</i>	282
<i>Implementation Suggestions</i>	282
Engineering and Technical Support	284
General SE Processes	284
Summary	285
25 Hiring Winners	287
The Job Description	288
Using the Hiring Profile	289
Dealing with Recruiters	291
Screening Candidates	292
The Interview	293
<i>Setting Expectations</i>	293
<i>Be Prepared</i>	293
<i>Questions and Answers</i>	295
<i>Judging the Candidate's Performance</i>	296
Hiring	296
Summary	297
26 Time Management for SEs	299
Fixed Time and Infinite Demands	299
<i>Running Your Schedule Like a Business</i>	300
<i>The Procrastination Problem</i>	301
Prioritization	301
<i>Qualification</i>	301
<i>Quantification</i>	302
A Simple Structure for Managing Your Time	302
<i>Importance</i>	303
<i>Impact</i>	303
<i>Timeliness</i>	303
<i>Prioritizing the Tasks</i>	304
How to Run Your Day	306
<i>The Daily Close</i>	307
Designing Graceful Fallback Plans	308
<i>Get a Little Help from Your Friends</i>	308
<i>Apply the 80/20 Rule</i>	308
<i>Attaching Caveats</i>	309
<i>"Be Prepared" Prioritization Tactics</i>	309

Long-Term Time Management	310
<i>Negotiating Work Levels with Your Manager and the Sales Rep</i>	311
<i>Personal Commitments</i>	311
<i>Working in Abusive Environments</i>	312
Summary	312
27 Managing by the Metrics	315
Managing by the Metrics for the Individual	316
Managing by the Metrics for the Manager	316
Weighting the Metrics	318
Managing-by-Metrics Bonus Compensation Versus MBO	318
Rolling Out Metrics-Based Management to Your Organization	319
Avoiding the Pitfalls	320
Summary	320
28 Final Words	323
Be Passionate	323
Keep Work and Personal Lives in Balance	324
Consistently Outperform Expectations	324
Build and Maintain Relationships	325
Set and Achieve Goals	326
Continually Challenge Yourself	326
About the Authors	327
Index	329

CHAPTER

6

Chapter Goals

Understand strategies for building relationships with technical decision makers.

Know how to find and develop a coach.

Consider what credibility means in your business, and identify ways you can enhance your credibility.

Successful Customer Engagement

The easiest kind of relationship is with ten thousand people, the hardest is with one.

Joan Baez

Think back to when you were new to sales, whether that was yesterday or 20 years ago. When you attended a customer meeting, you would probably go expecting to hear what that customer wanted and have a discussion about how you might be able to solve that problem. As your sales career advanced, you learned that it was not enough to offer the right solution. In this chapter, we discuss the *metarules* of strategic customer engagement. The manipulation of politics and relationship building may seem cynical, even Machiavellian, but it is par for the course in today's world of high-value sales.

Do not assume that the business decision makers are the only ones with whom you need to develop relationships. Although conventional account strategy dictates selling high, you will need to cover key members of the IT team to prevent your competitors from

flanking you. Some of the concepts in this chapter touch on overall account strategy. You should be using the same guiding principles to approach the technical organization that the account exec uses with the business decision maker.

First Contact

You helped qualify the lead, responded to the request for proposal (RFP), and made the short list. Congratulations—now the real work begins. Relationships are everything in the sales cycle, and it is now up to your sales team to build the relationship with the prospective customer. As you prepare for your first contact with the customer, take some time to consider the following:

- ▶ How do relationships develop?
- ▶ What do you need to get out of this relationship?
- ▶ What do your customers want out of this relationship?

Your goals in every customer interaction during the sales cycle are two-fold. First, you need to gather the information necessary to satisfy the customer's demand for information while delivering a strong value proposition. Second, you are trying to uncover the unspoken decision criteria. Later in this chapter, we present a case study describing how the stated process often differs from the true process. Remember that in most cases a single individual does not make the ultimate purchasing decision. This is especially true for the technical decision makers on whom you will be focusing.

CASE STUDY: THE PAYOFF OF A GREAT RELATIONSHIP

Dave was part of a sales team working on a deal against two major competitors. The customer had supplied each vendor with the necessary technical evaluation criteria for the sales teams to put together presentations and proposals. Dave's team did so, after engaging in several rounds of discovery and discussion with the customer. After all of the presentations had been made and the vendor proposals were received, Dave's sales team was saddened to learn that they had lost the deal based on the technical criteria. Shortly after, however, the sales team learned that their high-touch customer engagement approach had paid off. The customer's evaluation team decided to change the evaluation criteria to include "Vendor Responsiveness." Dave's team's score was high enough to overcome the deficiencies in their product, and they won the deal. This case is an excellent

example of how relationship building can be more important than feature and function differences.



Remember What They Want from You

Let's start at the beginning, with what the customer wants. If you are lucky, the customer wants your assistance proceeding through the sales/purchasing process as quickly as possible. If you are not so fortunate, they want you to come in because they don't know what they are doing and hope to gain some insight by interviewing enough vendors. Although this chapter will generally assume that your customers are not just "tire kickers," you should continue to keep your qualification criteria in mind as you gather more information.

Hint: Make Your Own Luck

If you think the prospect you are dealing with is not serious about buying, try to drive quickly to establish a coach. Find someone with a professional reputation to uphold and the relationship to help you validate whether you should pursue working with the prospect or not.

Think back to your last purchase from a salesperson. If the salesperson was lucky (as defined above), you probably had a certain list of questions you wanted to get answered as quickly as possible. The sales representative you dealt with probably had a lot of information you did not have that may have helped you make a well-informed purchase. In most cases, you did not go into the transaction hoping to make a new friend. When you deal with your customers, they will probably have a similar expectation. Some may even view interacting with salespeople as an unfortunate side effect of buying something—ever bought a used car? As such, you should expect that your early encounters will be businesslike and not overly familiar. This should not be a great revelation for most readers. Interestingly, conduct in initial meetings is actually a greater concern for more experienced salespeople. The more experience you have in dealing with people, and with selling in particular, the greater the possibility that you will begin selling hard too early in an encounter. Keep the charm in check until you know your customers better, and you will avoid the risk of appearing manipulative.

Hint: Divining Personal Agendas

When working with your customers, try to put yourself in their position. Can you see how your solution will benefit them personally? Don't be shy about asking them what their

“win” is if the project goes through. If they do not have a win, you cannot assume they will support your solution.

Dissecting Project Dynamics

When you meet with the customer, keep in mind that their organization is just as fragmented and confused as any with which you have dealt. If you are dealing with a group of people, it can be very easy to think that they all have similar motivations and goals. This is never the case. Each will have goals that may only be achieved at the expense of the others'. The IT group may want to get a business group to fund a new project, whereas the business group may expect the project to be funded as part of a previous budgetary exercise. Your access to this information can actually be a good measure of the success of your sales campaign. The more likely you are to win the deal, the more likely it is that the different players inside an organization will try to use you, your company, or your solution to their benefit. Not all organizations are this cutthroat, but if you are dealing with executives, you should be prepared for this type of behavior. Although this may sound manipulative, executives are paid to make the maximum impact with available resources.

It is important that you work with your sales representative to identify the relationships among different groups. Obviously, you want to try to make as many of the customer's people as happy as possible. Unfortunately, it is not always possible to make everyone happy because of resource constraints or conflicting political aspirations.

Back the Strongest Faction

If you are dealing with multiple factions that have mutually exclusive designs on your solution, then you have a decision to make. Once again, make it with your sales representative. Dealing with political infighting is incredibly tricky. The best guidance is that you should try to support whichever group has the greatest influence on the overall decision. This seems obvious, but many sales efforts have failed because the sales team did not understand this principle. The classic example is a sales team that engages with the IT department when the business buyer has purchase authority. An example is given in the following case study.

CASE STUDY: MANAGING DIRECTOR, 1; ARCHITECTURE STANDARDS BOARD, 0

One of our most painful losses was in a sales effort targeted at a major Australian telecommunications provider. After flying to Sydney on 2 days' notice, we ran an intensive sales campaign over the course of a month. We established relationships

and developed coaches within the system integrator running the evaluation, as well as with key employees at the customer. We spent weeks working with their architecture standards board to help them see that we had a superior solution. At the end of the evaluation, we won, only to find that everything we had been told had been wrong. Our coaches had thought they were responsible for making the decision, and we had won based on their requirements and goals. Unfortunately, their decision was overturned by a managing director of the company to whom we had had no access.



If the sales team in the case study had had a coach within the IT organization, the team might have known that such a power play was under way. Unfortunately, the team did not have the time or access to block their competitor's flanking move.

Identify the People You Need to Know

Imagine yourself meeting the project team. You are in a room filled with 20 people. Each may represent a different group with a different point of view. There is no way you can make a connection with everyone, so how do you decide?

Use Your Intuition

In a free-form group situation, focus on two characteristics of the participants: titles and styles. In general, you should try to connect with the most senior people possible on the theory that they have the greatest decision-making authority. Also look for the people who naturally seem to drive the discussion. These people will usually either have some decision-making authority or represent the interests of those who have the authority but lack the subject matter expertise. A third group does exist: natural boors, people who speak to hear themselves talk. Individuals who match this type are pretty easy to pick out.

But Don't Forget to Use Your Brain

As your sales team gains understanding of the political situation in the account, you should plan your customer engagement process in accordance with the customer's decision process. If the customer is weighting 80% of the decision based on the input of one group and 20% on the input of another, try to allocate your time intelligently across the two groups. You certainly should focus on the more influential group, but not to the extent

that you lose the 20% of the decision the other group commands. If you know which specific individuals are making the decision, be sure to ask them about how they plan to make the decision. Managers will usually have trusted lieutenants who may be responsible for different parts of the decision. If this is the case, the managers will usually be happy to have you engage the lieutenant to ensure they have sufficient information to make their recommendation.

Covering the Whole Team, Including the Minor Players

While you are plotting and planning and developing a strategy to connect with the key decision makers, it can be very easy to ignore or insult other team members. You can avoid this by actively engaging the minor players on the team during group meetings, working lunches, and so forth. Usually, the more junior staffers are there because they are either responsible for advising the decision maker on some aspect of the project, or they will be expected to deliver the results you are promising. As such, they need to feel good about your sales team and your product, even if they don't have a significant say in the purchase decision. Giveaways such as T-shirts and coffee mugs are other cheap methods to reinforce the team, even if you don't have the time to spend with each person individually.

Managing the secondary players can pose some challenges. Frequently, they will have concerns that are important in their area of responsibility but not in the context of the decision being made. If the staffer is vocal and his management is not strong enough to keep the team on track, then it is up to you to make sure you satisfy him or her without derailing the larger team or taking up too much of your own time, which is better spent with the key team members. A good way to deal with these situations is by asking to follow up with the staffer "off-line" to address his or her concern. This gives you the option to defer an unpleasant or merely unimportant conversation until later. You can then resolve the obligation in a number of ways, as described in the objection-handling chapter (Chapter 15). Unless you feel further conversation will aid your cause in some way, the simplest approach may be simply to bury the target in marketing and technical material.

Coaches

If you have been in sales for long enough, you know that the most critical person on the team is your coach. Some sales methodologies refer to this individual as a mentor. A *coach* is a person who works for your customer and

is willing to give you information beyond that to which your competitors have access. The coach is the person who lets slip information about where your competitors are weak or what pricing the customer is most likely to find acceptable. You should have a coach who is part of the inner circle of decision makers, but anyone with access to important information can potentially be a coach. You should also realize that the coach is usually violating the spirit of the purchase process, in which most companies insist on providing a level playing field for all vendors.

Your sales team should establish a coach within each center of decision-making authority at the customer. Typically, there will be at least three levels of coach: executive, line management, and IT. Your sales executive will generally work to make sure each camp is covered by an equivalently senior person from your company.

The salesperson-coach relationship usually comes about in two phases:

1. You develop a good working relationship with the individual in question.
2. Once you have established the relationship, the future coach determines that he or she will personally benefit from your solution's being chosen.

Take note of the existence and order of these two stages. Only after both have occurred can you attempt to cultivate the individual as a coach. If the potential benefit to the individual is significant, he or she may initiate the coaching relationship. In a technical-sales situation, it usually takes longer for customer team members to evaluate your solution to find how it benefits them, but if you have the right features in your product, the coaching relationship can be very strong. This is especially likely if certain philosophical or standards-oriented differences exist between your company and your competition. A famous example is that of Microsoft and the rest of the software industry. If your products are based on Microsoft technology, a significant percentage of technical architects are fundamentally going to love you or hate you, no matter what else you do from a sales perspective. By finding points of mutual benefit, you can then convince your coach to help you in other areas as well.

Hint: Do You Have the Time to Develop a Coach?

If you are effectively utilizing the coaching concept, you should actually be reducing the amount of time you spend on the account. Your coach should be helping you avoid

busywork and deliver more targeted messages. If this is not happening, you don't really have a coach.

Where to Find Coaches

How do you find a coach? Begin by trying to apply the criteria defined above. Make a list of the people you have built a good relationship with during your initial interaction. Next, check off the names of the people who might stand to benefit from the success of your solution. The challenge here is in knowing enough about the team members to have a sense of their personal interests at this point. In some engagements, personal biases come through very clearly; in others, you will have to work to get that information.

What If There Are No Obvious Options?

Go back to your list of friendly contacts, and start buying lunches. If you haven't yet built that level of rapport with any individuals, start asking for one-on-one or two-on-one meetings. You can do this under the premise of doing more research about the customer's needs. If you really have no insight into the organization, therefore no idea who would make a good coach, you should consider approaching groups of two or three people at a time. Having one-on-one interviews with an entire project team would be very time-consuming, and in some cases awkward.

How to Get to Potential Coaches

Be Appropriately Friendly

As the technical side to the sales equation, your best bet is just to be yourself. Technical people often get a bad vibe from someone who comes off too strongly or even simply has a lot of natural charisma. Your organization may have access to information or perquisites the potential coach may value. Try to find out about the potential coach's personal and professional interests. Good possibilities for technical coaches might include free conference passes or inclusion in technical discussions with leaders within your engineering organization.

What If I'm Not a People Person?

Better change your ways—this is sales after all. If you are uncomfortable with the level of personal interaction we recommend, work with your manager to help you develop that side of your personality. Most companies with experienced sales management will not hire someone who doesn't have a certain minimum level of interpersonal skills. One SE was resolutely against professional sports before becoming a salesperson. He found sports to be an

excellent icebreaker in discussions with clients. He took up a study of the rules of major sports and now uses sport-related chitchat to find common interests with customers.

Developing the Coach

Once you have established your relationship and identified your potential coach, try to convince that person of the benefit you have to offer. The best way to do this is to be very open. Explain that, based on your analysis, your solution should provide a certain benefit. Engage the coach to see if he or she agrees, then find out if he or she thinks this is a benefit that your competitors do not offer. If your value proposition truly is unique and your potential coach has any personal interest in the value, you should start to see some support. If your product's benefit will result in a raise or bonus for the individual, it is very likely he or she will coach you.

You have now begun the relationship. Your coach's value will depend on the relative value of your solution and the ethical/political bent of your contact. If your coach sees a potential promotion as a result of helping you, it is more likely that he or she will be willing to tell you how you are faring against the competition and other important information.

The Unconscious Coach

Another type of coach you can cultivate is one who doesn't realize the value of the information he or she is sharing with you. This is actually less coaching than just vigorous information gathering. Technical staff members often fall into this category. They have a tendency to let slip details about project budgets or competitive solutions in the midst of seemingly innocuous conversations. The downside of using this type of coach is that you truly are being manipulative. Consider whether this is in line with your personal values before using this approach.

Hint: Can You Have More Than One Coach?

The best type of coach is the actual decision maker, so it would be difficult to have more than one of those. You can establish different coaches within different parts of your customer's organization. Frequently, you may have one or more technical coaches in addition to your primary business coach.

Maintaining the Relationship

Follow Up with Natural Frequency

Once you have built your relationship with the coach, you should keep up your communications with him or her. If you let a relationship go cold, you

may miss out on important information, and you may find it difficult to reestablish the original rapport. If you only call when you need something from the coach, your approach will become transparent very quickly. If possible, you should try to meet your coach physically for lunch or dinner at least every 6 months, even if there is no activity on the account.

What Can You Ask Them to Do for You?

What type of assistance is it reasonable to ask a coach for? Use your instincts as a guide, but realize that, as a technical person, you may be inclined to underutilize that relationship. If you are asking your coach to do something he or she is uncomfortable with, you will usually discover this very quickly. You can then adjust your approach accordingly.

Here are some common ways a coach might help you out:

- ▶ Providing competitive materials;
- ▶ Giving you early or exclusive access to inside information;
- ▶ Providing you with technical documentation that had not been officially provided;
- ▶ Giving you a sense of what really needs to be done in the account;
- ▶ Assisting in escalating issues;
- ▶ Giving you an idea of how your sales team is doing in the evaluation.

In summary, the coach is your way to find out important insider details that will give you a competitive advantage in the account. Most coaches will do this because they believe your winning the deal will result in some personal benefit for them. If you build coaching relationships and then make them successful when your project is implemented, you can expect the coach to be available to help you out with future sales or career situations.

Credibility

Maintaining Credibility

As a technical salesperson, your position and value in the account is completely predicated on your credibility. Credibility will usually mean a combination of the following traits:

- ▶ Professionalism;
- ▶ Industry and domain expertise;

- Deep product expertise;
- Perceived value added in other ways.

Most of what you do is provide information to your customers. If you give your customer misinformation, then what value do you provide?

Losing Credibility

You do not always have to be perfect. Unless you have a very simple product, you will probably occasionally make mistakes or need to involve product specialists. The major negative behaviors are lying or making up answers to customer questions. If you make a statement and later find out that you were wrong, you should definitely consider telling your customer. If they find out independently, you will certainly lose credibility.

Trying to Regain Credibility

Think about the proverbial “sleazy” salesperson. Such people give the profession a bad name because they are willing to say anything to close a deal. Would you trust someone who, either knowingly or through ignorance, gave you incorrect information related to a major purchase? If a house inspector failed to find or mention the termites in the home you were considering bidding on, what would it take to get you to use that inspector again? Your best option is to apologize (if possible) and move forward. If you feel damaged credibility is impacting your effectiveness, you should consider bringing in other salespeople. If you find out that your customer is going around you to speak directly with other people in your company, this is a good warning sign that you need to improve your knowledge and your relationship with that customer.

Know What You Don't Know

Reflecting back on the unsuccessful trip to Australia in the opening case study, you must focus on finding out what you don't know. A good approach is to ask the decision makers you have access to who the final decision maker is. If it is them, then you are in good shape. If they tell you it is someone else, you need to get close to that person. If they indicate it is a certain committee, find out who is on the committee. If they hedge or are evasive, this may mean that there is no process (and perhaps no budget) or that they are not connected with the process. Find out where the buck stops

and work backwards to make sure you have relationships with all the key influencers of the final decision makers.

Summary

In sales, the customer is king, and each customer expects to be treated like one. Finding out which of these “kings” holds the real key to the treasure vault can be a challenge. Institute a process by which you can find out which customers will be key to your success. While engaging with the customer, focus specifically on the development of one or more coaches within the account. These coaches will help provide information, clear roadblocks, and let you know your competitors’ tactics. Armed with a good engagement plan and a good coach, the account will be yours to lose.

By considering how your customers see and value you, you can learn how to develop and maintain your credibility. Credibility and reliability are everything in sales, and by consciously developing these traits, you will improve your relationships with your customers and make their purchasing from you in the future more likely.

Skill Building

New SE	Work with your manager to understand how to identify the key roles within an account. Think of diplomatic ways to avoid spending time with the less important players who may not be critical to the purchase process.
Experienced SE	Make sure you know how your proposal will advance the interests of each key individual with whom you are dealing. Self-interest will guide more decisions than feature and function comparisons. Build your credibility. Become a professional whom customers like to buy from and would recommend to their friends. Use this credibility to build relationships with coaches in new and existing accounts. Building this network will help you in current and future sales positions.
SE Manager	Make sure your salespeople have a good understanding of the purchase process and the key customer roles in that process. Define the characteristics and “care abouts” for each role. This information will help your salespeople minimize their engagement with those who will not be making the decisions.