



# MTS 307 – THE TRUSTED ADVISOR SALES ENGINEER

## Mastering Technical Sales

A one or two day workshop designed specifically for Solution Architects / Pre-Sales Engineers. The focus is on the practical application of the professional skills required to assume the role of a Trusted Advisor with relation to their customers.

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## MTS 307: Becoming The Trusted Advisor – Outline Curriculum

This is the outline curriculum of a one day workshop designed specifically for Solution Architects / Pre-Sales Engineers. The focus is on the practical application of the professional skills required to assume the role of a Trusted Advisor with relation to their customers.

### Learning Outcomes

As a result of attending this class:

1. The SE will build and define their personal definition of what a Trusted Advisor is and what a Trusted Advisor does in the context of their job role and their function.
2. The SE will learn the five component factors of the Trust Equation and how they relate to current and future behaviours.
3. The SE team will create their own Trust scorecard and apply that system to a series of business relationships
4. The SE will apply the learning through a series of role-plays, small and table-sized exercises and real-life case studies.

### Module 1 – Self-Discovery and Definitions

Before we start, let us take a step back, be “real” Sales Engineers and do a little Discovery about ourselves, our jobs, the way we sell and how that relates to the T/A – Trusted Advisor – role. Although an SE typically has two customers – the external paying customer and the salesperson, we’ll look at this from the external customer point of view.

#### So What Is A Trusted Advisor?

*White Board Exercise – Is/Is-Not*

*Survey - What Your Customers Really Want From You  
(And how that relates to the Sales Process)*

*Emotionally – 12 Things*

*Logically - Top 5 Characteristics – Global Survey*

*Your Definition Of A T/A – Tweet Size*

*Your Definition Of A T/A – Characteristics and Examples*

*“Not A T/A” – Setting Opposites*



## Defining The End Points

What Happens Now? (Current State)  
What Should Happen (Desired State)  
How Do We Get There (Starting The Transition)

## Module 2 - The Trust Equation

We can talk about “Trust” as much as we want, but how is it measured? Can we measure it? We look at the five key factors that constitute trust and build a scorecard that we can use to measure each one of the components as it relates to the relationship with the customer.

### The Five Factors Of Trust

Introducing the “Trust Equation” – CRISP

*Credibility*  
*Reliability*  
*Intimacy*  
*Self-Orientation*  
*Positivity*

### Applying The Equation

Looking At The Variables  
*Self-Evaluation – Your Trust #*  
*Main Class Exercise >> Developing A Scorecard for the Equation*  
Using The T-Scores When Dealing With Customers (and Sales)  
*T-Scoring A Customer*

## Module 3 – In Practice: Quick Read / Customer Profiling

Categorization – Using DISC/Colors to Flash-Read  
Multiple Exercises – *Case Studies/Personalities*  
*What Would You Do?*



## Module 4 – Monday Morning Behavior

What Happens When You Leave The Class?

Group Tasks

Individual Tasks

Creating A “Press Release”

### Key Deliverables

Each student will leave the class with:

1. Their definition of Trusted Advisor
2. A scorecard of their Trust strengths and weaknesses
3. A “Relationship Improvement Plan” to put in place for 2-3 of their top clients
4. A common language around Trust and how to utilize the Trust score during strategic account and tactical opportunity planning.
5. A set of short (<90 days) and longer (91-365 days) tasks, activities and behavioral changes to review and prioritize with their manager and then execute with measurement.

$$T = \left[ \frac{C+R+I}{S} \right] P$$

