



Mastering Technical Sales

2037 Trowbridge Drive

Newtown, PA 18940

Phone +1-215-431-1552

John@masteringtechnicalsales.com

www.masteringtechnicalsales.com

John Care, Managing Director

The Trusted Advisor Sales Engineer

Fact or Fiction?

“You need to become a Trusted Advisor to your clients.”

I wish I could earn a royalty payment every time a sales or presales leader uses that phrase. Yet becoming a Trusted Advisor (T/A) it is not as easy as it sounds, which is why so many organizations never even try, or make half-hearted efforts. Those two words, five syllables and fifteen letters contain a massive amount of meaning and assumptions. Most people claim to know a T/A when they see one, and understand the benefits, but have trouble defining exactly what it means.

You start thinking about questions like:

“Exactly what is a Trusted Advisor?”

“How do you know if you are a Trusted Advisor?”

“How do you enable Sales Engineers to become Trusted Advisors?”

“Can a Sales Engineer with a Quota ever be a Trusted Advisor?”

“What’s In It For Me?”

Here are some ideas to guide you along the path of becoming a Trusted Advisor. For more you can always read the [Trusted Advisor Sales Engineer eBook](#).

Defining A Trusted Advisor Sales Engineer

The most essential part of the definition is that the T/A label is NOT one you can give yourself, nor is it one that the company can put on your business card. Being a T/A is actually a label or characteristic that your customers apply to you. That is an important point, as the core of a T/A means looking at almost everything through the viewpoint of your customer.

We can start by breaking the words apart. First, we have the “Trust”. What makes a customer actually trust you? It is much more than your technical knowledge and capabilities, as those are the basic table stakes that customers expect of any SE they deal with. For an SE it is a combination of honoring your commitments, speaking the truth, and acting in the best interests of the customer – even if that may conflict with the best interests of your own company.

Now we move onto “Advice”. We have all been in the situation when we have given people personal or professional advice and they have ignored us. Your customers have to be willing to listen before you can provide advice. What makes them willing to listen to you? At least some part of the Trust. Some personal examples:

1. Jennifer at my local Office Supplies store. Over the past six months, she has saved me a small fortune on printer supplies and binders by pointing out coupons, multi-packs and special offers. Less money for Staples, more for me. Except I just bought a new laptop and printer at Staples instead of Best Buy. Trust!
2. Nancy at my local Bank. She recommended a wrap-around account for my business and personal finances, pointing out the many benefits. It sounded great, except she neglected to mention an enormous minimum balance requirement. So I refinanced my mortgage with another financial institution. No Trust!
3. Me. One of my customers wanted me to create a one-day training session for their European SE team to wrap around a big conference. Looking at what they wanted, the timing and the commitments their team already had it would not have resulted in a great session. I told them (nicely) they were crazy to try this even though I was turning down work. They are one of my best references. Trust!

Question #1: What can you do to demonstrate to your customer that you are acting in their best interest? (It does not have to involve saving money).

Question #2: Think about a recent situation when you provided (good) advice – and it was ignored. Why did that happen? (The other person was a complete idiot is NOT the answer you should be looking for!)

Question #3: Think about a recent situation when you provided (good) advice – and it was taken. Why did that happen?

What Are The Characteristics Of A Trusted Advisor Sales Engineer?

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

A good starting point is the definition used by Charles Green in [The Trusted Advisor](#). He defined trust as measured by Credibility, Reliability, Intimacy and Self-Orientation. It’s worth defining these as they relate to an SE. Mathematically you want high scores in **C,R** and **I** and a low score in **S**! I added a “**P**” at the

end to account for Positivity and to get a cool mnemonic – **CRISP**.

C-Credibility. The great thing about being an SE is that you automatically bring some credibility to the sales situations. When you and the sales person are together then you are the one who is likely to be considered as more credible because you are not “that sales guy”. You can further break this down by

evaluating are you believable at the time you speak/act, and are you ultimately proved “right”? One of the biggest “C” traps is feeling that you have to prove your value every minute you are in a meeting. Sometimes the best credibility comes from listening very hard, and then speaking.

R-Reliability. Years ago, I went to a management class back in England and I was taught about **DAYS** – Do As You Say. That acronym has stayed with me ever since. If you are serious about becoming a T/A then it is not too hard for you to live up to your commitments and honor your word. What proves difficult is when other people in your organization impact the reliability measure. You can promise an answer in 24 hours, yet if Product Management does not get back to you – then you are stranded.

I-Intimacy. Intimacy measures how well you know and understand the customer, both personally and professionally. It does not mean that you know the name of her husband, children and favorite coffee drink (it may help), but that you do understand their personal wins, their feelings about any situation/sale. In essence, it is all about putting yourself in the customer’s shoes. The intimacy also extends to the business issues, as the #1 thing most mid to senior level executives expect from a vendor’s presales organization is someone who understands their business.

S-Self-Orientation. This measures how much you are thinking about yourself and your company versus the customer’s needs. When you find yourself thinking about selling instead of solving, of quota instead of discovery questions, or of transactions instead of long-term strategy – then that is a high S. I feel this is the hardest characteristic for an SE to adopt in a sales-driven culture given the quarter-to-quarter transactional pressures.

P – Positivity. We all know those people who spend their time looking for problems and issues as opposed to a healthy balance, which includes opportunities and innovation. You can be a T/A with a low “P” score – many finance, legal and medical professionals fit into that category. So, unfortunately do many SE’s – particularly when speaking with their sales counterparts. When you point out the yellow and red lights in an opportunity, highlight the greens as well. The same applies to working with your clients.

A Quick Trusted Advisor Test

Question #4: Does your customer ask you for advice about technology or services that your company does not provide? (i.e. you are an SE for a backup/recovery company and the customer asks for your input on topics such as storage, or servers, or virtualization strategy.)

Question #5: Look at the following table that compares Product Expert to Trusted Advisor. Check the box in each row that best describes you. How many items do you have in the right column versus the left? How would your boss and your customers score you?

PRODUCT EXPERT	TRUSTED ADVISOR (EXPERT)
<i>Talks about technology</i>	<i>Talks about applications</i>
<i>Justifies technology value</i>	<i>Justifies business value</i>
<i>Understands how features work</i>	<i>Understands why people need features</i>
<i>Knows current competitors</i>	<i>Know where the market is going</i>
<i>Seen internally as a valuable resource</i>	<i>Seen internally as an organizational leader</i>

The Differences Between Being a Product Guru and a Trusted Advisor/Expert

Source: Dave Kellogg/Kellblog

How Do You Get There From Here?

We've been highly successful helping SE teams approach this problem as if it were a sales opportunity:

1. Start by establishing your definition of a T/A inside your company. Remember that you can be a T/A with your customers, with the salespeople and with your peers.
2. Now analyze current state – what is working now, and what isn't.
3. Clearly describe future state – when you are operating in the mode of a T/A, as you have defined the role. Include the benefits so you can “sell” the concept.
4. Gap analysis – what skills, processes, culture changes etc. are required to overcome the obstacles and move ahead. Understand what needs to change in other parts of your company.
5. Differentiate between short-term wins and longer-term wins. You need to plan for both to obtain and maintain momentum.
6. Get professional help. Do some research and reading, *Speak with me of course*, check out what some other organizations have done, and what they have not.
7. Lay out the plan and then execute it.

It is important to understand that the #1 hurdle to overcome is placing the customer first. Many companies talk about this, fewer actually do it, and only a bare handful measures the effectiveness. Unless you remove quota and variable compensation from a SE there will always be some immediate behavioral conflicts, but once you realize the longer-term gains that come from the T/A position it becomes accepted. Trust me.... We have the data to back it up!

“The trick to gain customer trust is to avoid all tricks.”

Jerry Weinberg, Author/Consultant

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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