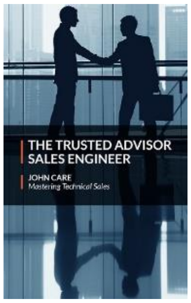

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The PreSales – Sales Relationship

Sales Partner, Sales Guide or Sales Tool?

"How Can We Get Sales To Buy Into This Approach?"
"Sales Just Treats Us Like A Tool or Resource!"
"What Do You Expect Us To Do – Say "No" To The Sales Rep?"

Whenever I am in front of a group of Sales Engineers, whether it is a workshop, a keynote speech or even a consulting engagement, at least 80% of the time I'll hear one of those comments. To me it is a sad reflection of the state of the sales-presales partnership in many companies, and is the reason that so many "Solution Selling" initiatives fail. There is, of course, fault on both sides – although the very fact that we speak about "sides" indicates a sometimes contentious and competitive environment.

What follows is an edited transcript of a Q&A discussion I had with a group of 20 presales managers at a sales kickoff. At the end you'll find an abbreviated relationship scorecard which I'd encourage you to complete honestly – and then have your sales counterpart do the same.

Q: Looking at a typical organizational structure – where does presales report in?

A: In most cases, I see presales reporting into the sales organization. That is, there will be either regional (Americas, EMEA, APJ) leads reporting into their respective sales theater leaders or there is a Worldwide presales leader who works for the WW VP of Sales. Sometimes presales reports into services, which is usually a disaster, and occasionally presales has a leader who reports directly into the executive council, which is fantastic.

Q: What about presales reporting into a local branch/district sales manager?

A: Not a big fan of that. The two functions are so different that often the sales leader just doesn't know how to manage the care and feeding of presales. You also get a minimal amount of sharing between different presales teams around the geography. There are exceptions, but this is usually a high turnover environment.

Q: So what are the benefits of reporting into sales?

A: Many. **With revenue comes power.** It's usually easier for a sales leader to go get something done within the company than a presales leader as they have the power of quota behind them. The art is in having strong presales leaders who can advise and direct sales. Strangely enough, I've found that if you are up-front that you are trying to "sell" them on doing something then sales leaders really appreciate it. The leverage of a sales leader "de-committing" a deal from forecast because another organization won't live up to their promises is immense. That's not something we in presales can ever effectively do.

Q: How would you define the optimal sales-presales partnership?

A: It's exactly that – it's a partnership. And that should be true at any level. Throughout my career, and I see this echoing in top-performing companies, the sales leader is the senior partner, and presales the junior – but they are both on the hook for delivering their quota. Whether it is at first-line management or at the Director/VP level – you live and die together on your achievements. It's important that it happen at all levels so that individuals can see the partnership being "lived-in" by the executives, and first-line managers learn to team and work together.

Q: But that doesn't happen too often, does it?

A: Well – not as often as I would like to see it. I know I have some bias, but I do see some appalling behavior out there. Classic examples would be the show-up-and throw-up demo, no-discovery product presentations, pointless POCs and horrendous example of minimal qualification because the pipeline is thin. We, as presales engineers, are often complicit in encouraging this. There are also cultural implications. In some countries presales engineers naturally "rank" below sales and are reluctant to confront or speak up against their sales counterparts.

Q: I don't believe that .. give me some examples!

A: The essence of a partnership is that you spend enough time with another individual (the rep) to get to know each other and form a personal and business relationship. Yet when you set up your SE's as a "pool of resources", you are running counter to that philosophy. I had one rep tell me they went on twenty sales calls last month and worked with 17 different SE's. That is why the SE's were resources and tools. Even with the breadth of portfolio and allowing for inside SEs and telesales there is a better way of doing this.

A second example revolves around discovery. Any time an SE makes a zero-discovery call/demo/presentation you are enabling poor sales behavior. (See the Zero Discovery Sales Call article). Depending on your culture, good luck in asking a rep to complete a bunch of paperwork or filling a salesforce.com screen before the call, but you can at least barrage the rep with questions. I always advise an SE to; (a) get technical and business questions out the way first before you start asking sales qualification questions. Most reps have to go through this with their manager and don't view it as your place to ask if they have a budget and what the timeline is, for example. You can of course finesse this by framing the same question in the context of it helping you to position current/future product and possible product add-ons! and (b) ask for a customer contact.

One of my customers spent six months measuring the quality of discovery before their SE's got on a call and tied that to close rate. No surprise, the reps who performed the best discovery or allowed presales easy customer access performed the best against quota – by an average of 42% better. There are always cases when you have a "one-and-done" product demo, but the larger the company, or more complex the product, the less likely that is to occur.

Q: Is there an easy way to measure the strength of that partnership?

A: Not as simple as you might think. There is a lot of cultural fuzziness that gets in the way and many salespeople and sales leaders are happy having "their" presales team as a resource to direct. I came up with a five-point scale to measure it, where a "1" means you are nameless/faceless SE who is remotely scheduled to work with a customer you know nothing about, up to a "5" where you are a fully integrated part of the account team and treated as a Trusted Advisor by both sales and your end-customers. It's still a work in progress but has proved useful. What's really interesting is when you ask presales to measure it and then ask sales to measure it. There is often at least a 1-point difference between the two sets of numbers – with sales being more optimistic than presales.

Q: What is the sales perspective on all this?

A: Many sales leaders aren't happy with the current state of the union. From their perspective, a finely tuned team is more likely to execute better and therefore close more deals. On the other hand, their view of presales is that excessive process becomes a roadblock to making the sale and that they become the department of "NO". As one VP I used to work with put it. "*John – I don't want your team to be a roadblock to revenue, but they can be a speedbump – because I know my sales guys move too fast and forget important steps*." I think that is a great attitude.

Q: What’s a good first step?

A: Actually, I’d recommend two steps (so it’s more of a hop!). The first is to look at existing presales processes and see where they are duplicating those of sales. That often falls into deal qualification and success criteria (business, not technical). Nothing upsets a rep more than having to justify a deal to a presales person. The second is to carefully match up sales and presales leaders and actually talk about the issue. That needs to be framed in terms of accelerating deals, increasing win-rate, improving retention etc. but it’s not that hard. Presenting it as set of whines and complaints won’t get you too far. You’d be surprised as to what you might hear from sales leadership about the job you do (or don’t do). Then pick one area – which is usually discovery, trials or demos – and focus on that first.

Q: Final Question: How do we apply the things we’ve learnt in your workshops and get sales to buy-in? Can we get you to speak with our sales team?

A: I frequently do that. I put on my former IT Executive/CIO hat and tell the reps what I used to expect when the sales-presales team walked into my building and eventually my office. The most interesting thing is that the #1 skill that reps commonly value in presales is not the most important skill to the customer. Sales values technical knowledge and capability – yet your customers expect that of you as a basic requirement. The value-add that presales offers is in understanding the business and designing innovative solutions so that your customers obtain the results they want and need.

“Even if you're on the right track, you'll get run over if you just sit there.”

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.

To receive the monthly Talking Points Newsletter, email info@masteringtechnicalsales.com or sign up from the front page of the website.

THE PRESALES – SALES PARTNERSHIP – Abbreviated List

Level	Presales	Sales
1	SE allocation via calendar/schedule SE's operate as a pool No sales call debriefs Zero SE discovery High feature/function Operates at highly technical level Not trusted in front of mid to senior customer management Inconsistent or complex processes	Complain about SE unavailability when technical training occurs "Stop Me When You See Something You Like" Style presentations Reps set up meetings Passes any support/license issues to SE Complains to sales leadership before talking to the SE.
2	RFP factory "Demo Dollies" Discovery via email POCs are heroic efforts Never speaks to customer without rep High turnover rate Will throw rep under bus in front of customer Not trusted in front of customer CxO	POC/trials approved and initiated by sales Elementary sales call preparation Last-minute "Can You Just" calls Reps set up meetings and give corporate overview Hit quota more by luck than judgement Will throw SE under bus in front of customer Deals are lost because of 'Product, Pricing or Presales'.
3	Focus on the technical win Subjective Quota Club criteria SE's complete "technical" RFP sections May operate independently of rep to generate some new leads Links benefits to technology Generate some user success stories	Sales responsible for overall RFP Reps or SE sets up meeting. Debriefs after sales calls Seeks SE input on partner engagement 50/50 shot at hitting quota Complains first to SE before sales leadership. CRM/SFA Usage at ~ 33%
4	Paid on a number someone in sales actually cares about Shares in most SPIFs Specific Quota Club qualification criteria Joint account planning responsibility for closure. Trusted advisor status w/customers Works with sales leaders to accelerate ramping of new reps. Leads with business benefits Actively seeks out references and testimonials Simple and repeatable processes	Joint POC/trial approval Sales calls planned and gamed (what-ifs) Proactive recognition from sales management Explains to SE required outcome of a meeting. and works with SE to accomplish outcome Works with SE leaders to mentor new SE's in sales techniques Will reschedule/cancel call on advice of SE Exceeds 100% in Q4 Views support issue as a sales opportunity. Jointly plans with SE leadership to prioritize product/service enhancements.
5	Jointly present account plans Trusted advisor status w/sales + Trusted advisor status w/customers Operates independently in account from rep >75% Actively promotes success of sales reps. Retention rate >95%	Jointly present account plans Celebrates success of entire team Actively promotes cause of presales Hits 100% before end of Q3 Regular and informal planning meetings

Note: Circle those attributes you recognize within the sales and presales team. You'll usually have some form of bell curve distribution