

SCALING PRESALES  
WEBINAR SERIES

consensus 

October 17, 2023 – 9:00am MT

# The Last Frontier of Sales Improvement

Presales and Sales individual contributors  
working together better as an account or  
opportunity team – Making SEAMless Sales®

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# Bottom Line Up Front - Critical Business Issues (CBIs)

## Presales CBI

- Move the deal forward – increase the probability of a win

## Sales CBI

- Win more deals, have satisfied and repeat/renewal Customers

## Sales Team/Enablement CBI

- Help Presales and Sales win effectively and efficiently

Collectively, the goal is Client Satisfaction beyond the “sale”

## Key Takeaways

## MEASURING QUOTA

ARR is the most popular quota metric, irrespective of position and quota type.

Approximately 66% of persons and Leaders are measured exclusively by ARR or contain ARR, again with Total Contract Value (TCV) coming second.

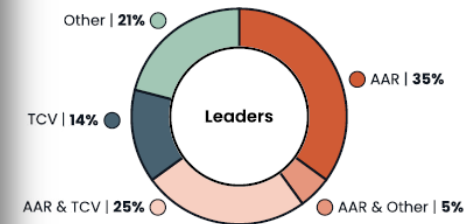
Approximately 74% of team quotas for ICs and Leaders are measured exclusively by ARR or contain ARR, again with Total Contract Value coming second.

## MEASURING QUOTA

ARR is the most popular quota metric, irrespective of position and quota type.

How is your **team** quota measured?

Approximately 74% of team quotas for ICs and Leaders are measured exclusively by ARR or contain ARR, again with Total Contract Value coming second.



# What We've Heard from Others...

## Presales/SE Issues

- Don't get enough or correct discovery to do proper technical proof
- Involvement at the last minute or with little time to prepare

## Sales/AM Issues

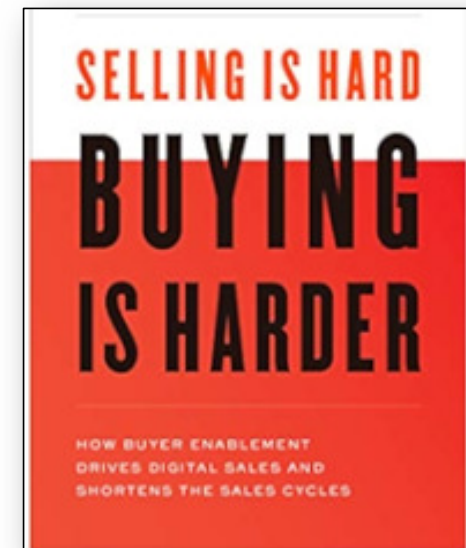
- Prospect wants a demo; show them a demo! I know "they will love it"
- SE "Will tell the truth" or "Say too much"

## The Client Issues with Sales Team

- Feels "pushy" – Harbor Tour – hard to follow
- Didn't listen, disorganized, weren't helpful

# Agenda

- The Challenges
- The Impact
- Proposed Solutions for Success
- Wrap-up



Presales is perceived as providing TWICE as much value during the sales engagement as their Sales counterparts

# 1 Clients don't trust Sales as much as Presales

## The Real Value Of A Sales Engineer

Throughout your technology purchase process, which of these sources/groups provided the most value to you and your team? (%) values

Customer Position	Middle Management	IT - Individuals	CxO / Executives
General Collateral	25.1	22.6	16.2
Salesperson/ Manager	21.3	18.8	22.6
<i>Technical Team</i>	<i>39.7</i>	<i>46.8</i>	<i>42.1</i>
Executives	13.9	11.8	19.1

Source: Mastering Technical Sales, 4<sup>th</sup> Edition Research / Updated April 2021

**1 Clients don't trust Sales as much as Presales**

**2 Unfortunately, Sales doesn't inherently trust Presales**

“A Sales professional will be inclusive if there is a deep sense of trust with the Presales professional; however, early engagement of the presales team in the sales cycle is rare.”

Excerpt from “Sales and Presales - A Relationship Narrative”  
by Karthik Krishnamurthy on LinkedIn

- 1 Clients don't trust Sales as much as Presales**
- 2 Unfortunately, Sales doesn't inherently trust Presales**
- 3 Sales method providers, Sales Management, and Sales Enablement are typically aligned with EITHER Presales OR Sales**



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What kind of negative impact have you experienced, or could you imagine, resulting from these three challenges?

- 1 Clients don't trust Sales as much as Presales**
- 2 Unfortunately, Sales doesn't inherently trust Presales**
- 3 Sales method providers, Sales Management, and Sales Enablement are typically aligned with EITHER Presales OR Sales**

**Presales resources are under or improperly utilized  
75% of the time.**

**This disconnect leads to frustration for the Client,  
for Presales, and for Sales**

**Client satisfaction suffers. Sales results suffer.**

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# Advice for Sales/AMs

## 1. Involve the SE more and appropriately

- Probably sooner than you may think is needed in the process
- Qualify and then partner

## 2. Provide Qualification and Discovery information

- Accurate CRM information and Call Notes
- Value Desired and Opportunity Strategy
- Competitive Landscape, and Decision Process including plans for overcoming “Do Nothing”

## 3. Engage your SE to expand Discovery and Implications

- Get more information and insights about Stakeholders’ Needs
- Plan questions, find quantified value, advise, challenge, confirm progress

# Advice for Presales/SEs

## 1. Use a “Help me help you” approach with Sales/AM

- Show the asset you can be – leverage your training and experience
- Ask for Discovery information that you need to prepare and do a demo

## 2. Speak the Language of Business

- Technical Solutions must be connected to Business Value/Outcomes
- Provide domain/vertical/persona expertise
- Find and manage “Risk to the Deal” – things that are not aligned

## 3. Focus on influencing key decision makers

- Address Critical Business Issues and the value realized when achieved
- Show how your solution alleviates pain and/or achieves gain
- Use the Driving Reason for Change and/or Critical Date to compel action

# Advice for the Sales Team

## 1. Collaboratively develop Account and Opportunity Info

- Business Needs/Critical Business Issues for Stakeholders
- What is known, what needs to be seen, and for what purpose

## 2. Plan deliverables and outcomes together

- Confirm the purpose and outcomes of meetings
- Dry-run key client meetings and demos
- Prepare a solid close and determine who is executing it

## 3. Discuss the decision process and “engineer influence”

- Opportunity strategy, key stakeholders, competitive landscape
- How to increase the perception of risk of “Do Nothing”
- Influence the perception of your Value compared with Alternatives

# For Management and Enablement

## 1. Consider Presales at par with Sales

- Presales is a Sales Role within the selling/buying process
- Presales secret weapon of sales – equip and utilize accordingly

## 2. Cultivate Account and Opportunity teaming

- Coach and teach areas of collaboration in the buying/selling process
- Unified focus on Client Success, not just the next meeting or demo

## 3. Reward as Presales/Sales as a Team

- Incentives to work together
- Joint KPIs focused on ARR



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# In Conclusion

When SEs and AMs work together, we will be able to:

**Help the Buyer through the process as a team**

- Move from “Push” to “Pull”

**Optimize interactions**

- For the Buyer and for us as a Sales Team

**Increase win rate, client satisfaction, and ARR**

- Move from “Sell” to “Buy”

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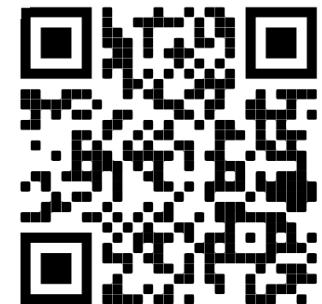
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## Q/A - Key Takeaways

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