Evolution of the Buyer's Process

What has changed in the past 7-10 years?

- SaaS including pay-as-you-go, no contract renewals, try and buy.

- Buyer engages sales later in the buying process - 60% or more.

- Self-service options preferred and expected.

- Sales activity during the buying window is smaller than ever – 17%.

- The buying process is more complicated – more stakeholders.

**In many cases, Presales & Sales have not changed accordingly**

Impact on Presales (SE) and Sales (AM)

What needs to change and why?

- Having a great solution or nailing a demo is table stakes.

- Getting the "sale" isn't enough –> commitment to consume.

- All things being equal, you are differentiated by your engagement.

- SE and AM must act more seamlessly once engaged.

- Need to proactively lead buyer to consumption and renewal.

Getting the sale ----> **Client success** 👍

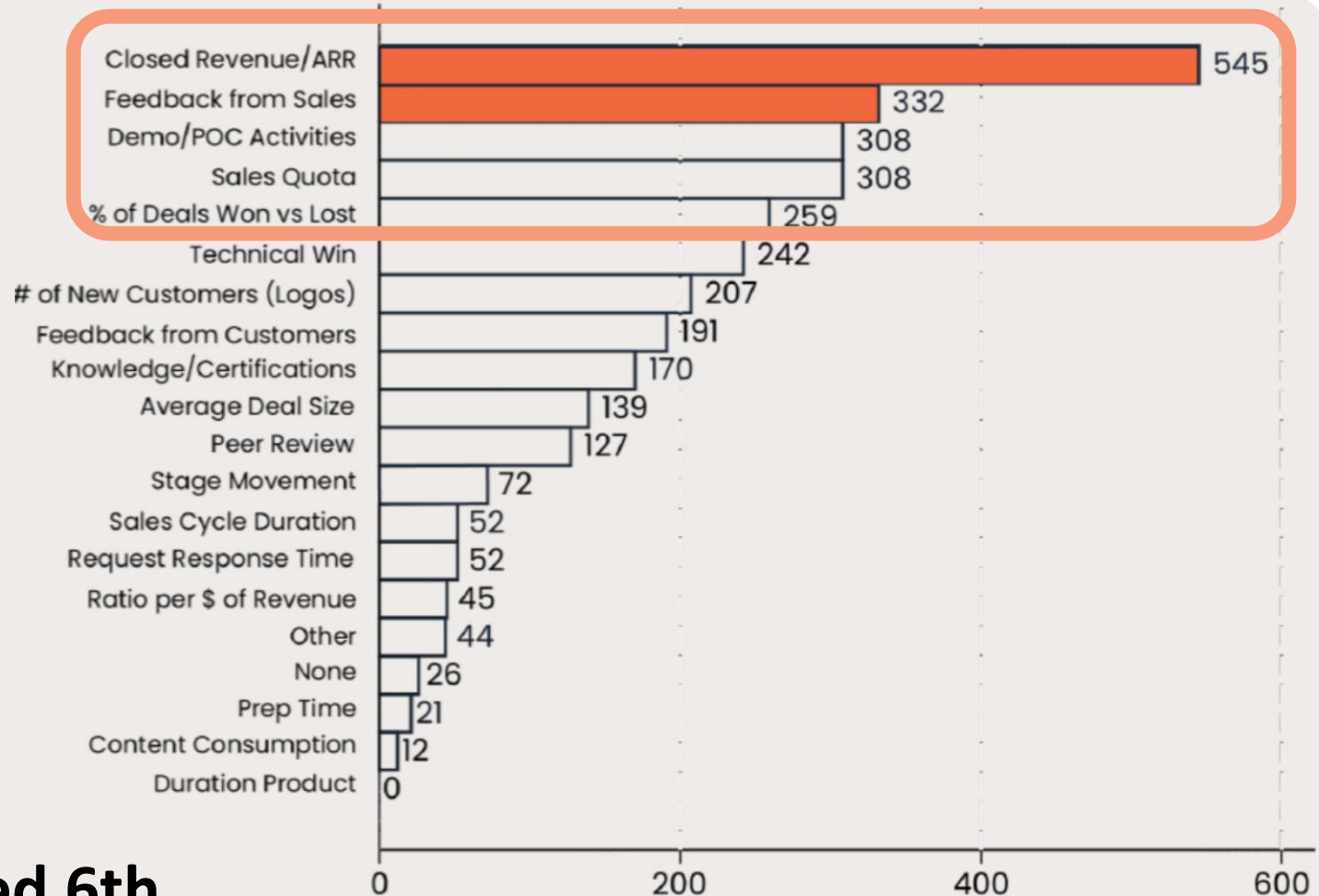# Traditional Roles And Span Of Engagement
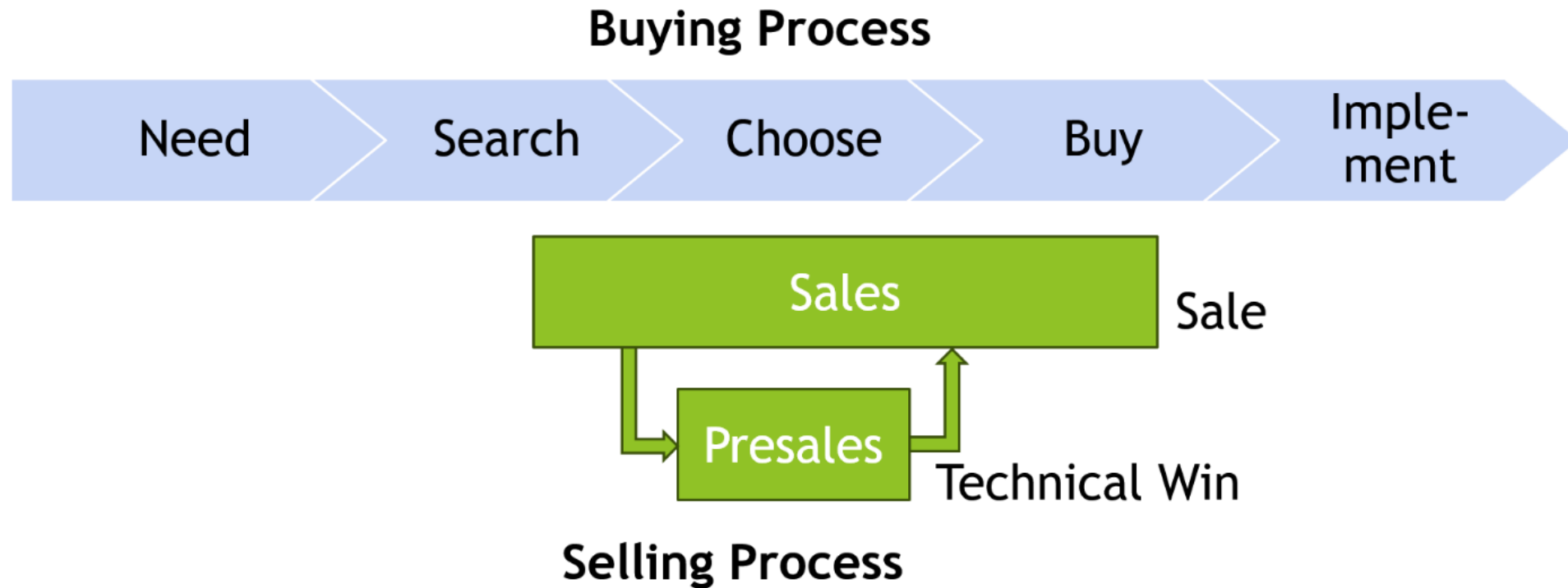
According to the 2024 Consensus SE Survey

Top 5 SE KPIs:

- Closed Revenue/ARR

- Feedback from Sales

- Demo/POC Activities

- Sales Quota

- % Deals Won vs. Lost

Technical Win ranked 6th

Closed Revenue/ARR — 545
Feedback from Sales — 332
Demo/POC Activities — 308
Sales Quota — 308
% of Deals Won vs Lost — 259
Technical Win — 242
# of New Customers (Logos) — 207
Feedback from Customers — 191
Knowledge/Certifications — 170
Average Deal Size — 139
Peer Review — 127
Stage Movement — 72
Sales Cycle Duration — 52
Request Response Time — 52
Ratio per $ of Revenue — 45
Other — 44
None — 26
Prep Time — 21
Content Consumption — 12
Duration Product — 0

Making SEAMless Sales®
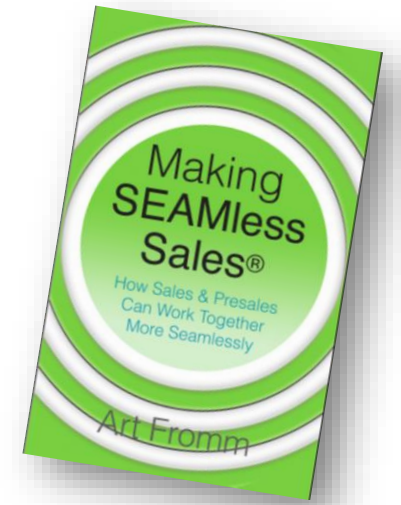
- Awareness of client-facing roles especially SE and AM engagement in buying and selling process

- Entire vendor team working together under umbrella of a buyer engagement lifecycle from hello to commission

- At the core: Working together better as a SE-AM team

Modern Buying and Selling Process

Typical Buying Process Stages

Establish Business Objectives	Analyze Needs and Impact	Explore Options	Evaluate Solutions	Commit	Implement	Measure Results
1	2	3	4	5	6	7
Identify Opportunity	Qualify	Discovery/ Prepare Solution	Present Solution	Proposal/ Close	Deploy/ Enable	Measure Results

Typical Sales Process Stages

Adapted from Steve Bistritz

High-level mapping of SE and AM roles in the buying process

Sales Engage-ment with Buyer Process

AM Qualify/Discovery

Business Close

Technical Proof **Technical Close**

Business Decision Maker (BDM)

Technical Decision Maker (TDM)

Influence

SE

Typical Buying Process Stages

| Establish Business Objectives	Analyze Needs and Impact	Explore Options	Evaluate Solutions	Commit	Implement	Measure Results
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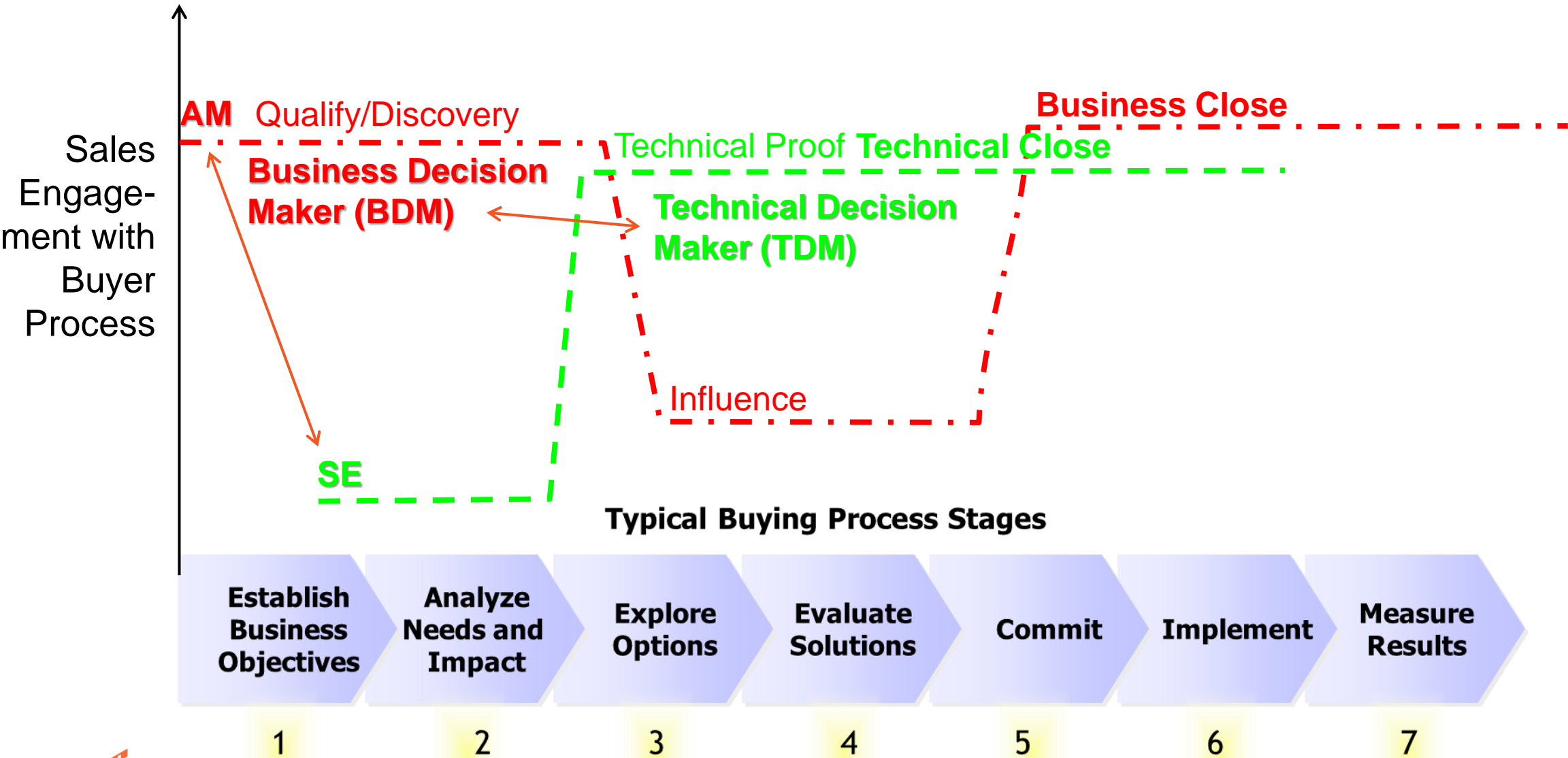
Technical and Business Close

The **AM needs to own "Business Closure,"** defined as confirming that the BDM:

1. Agrees that the business outcomes will be achieved as a result of the project (based on recommendation from the TDM), the potential business risks are addressed, and the investment or commitment to proceed is justified.

2. Commits to move forward with this project within a set timeframe, at the exclusion of other projects or priorities, including do nothing.

3. Compels the approver or person who can commit funds/resources to sign off on the project.

The **SE must own "Technical Closure,"** wherein the SE needs to confirm that the TDM:

1. Agrees that the solution meets the technical requirements in support of the BDM's business goals.

2. Commits to implement (consume or renew) the solution at the exclusion of the alternatives, including competitive offerings and do nothing.

3. Recommends implementation and long-term use of the solution to the BDM.

Buyer Enablement Lifecycle
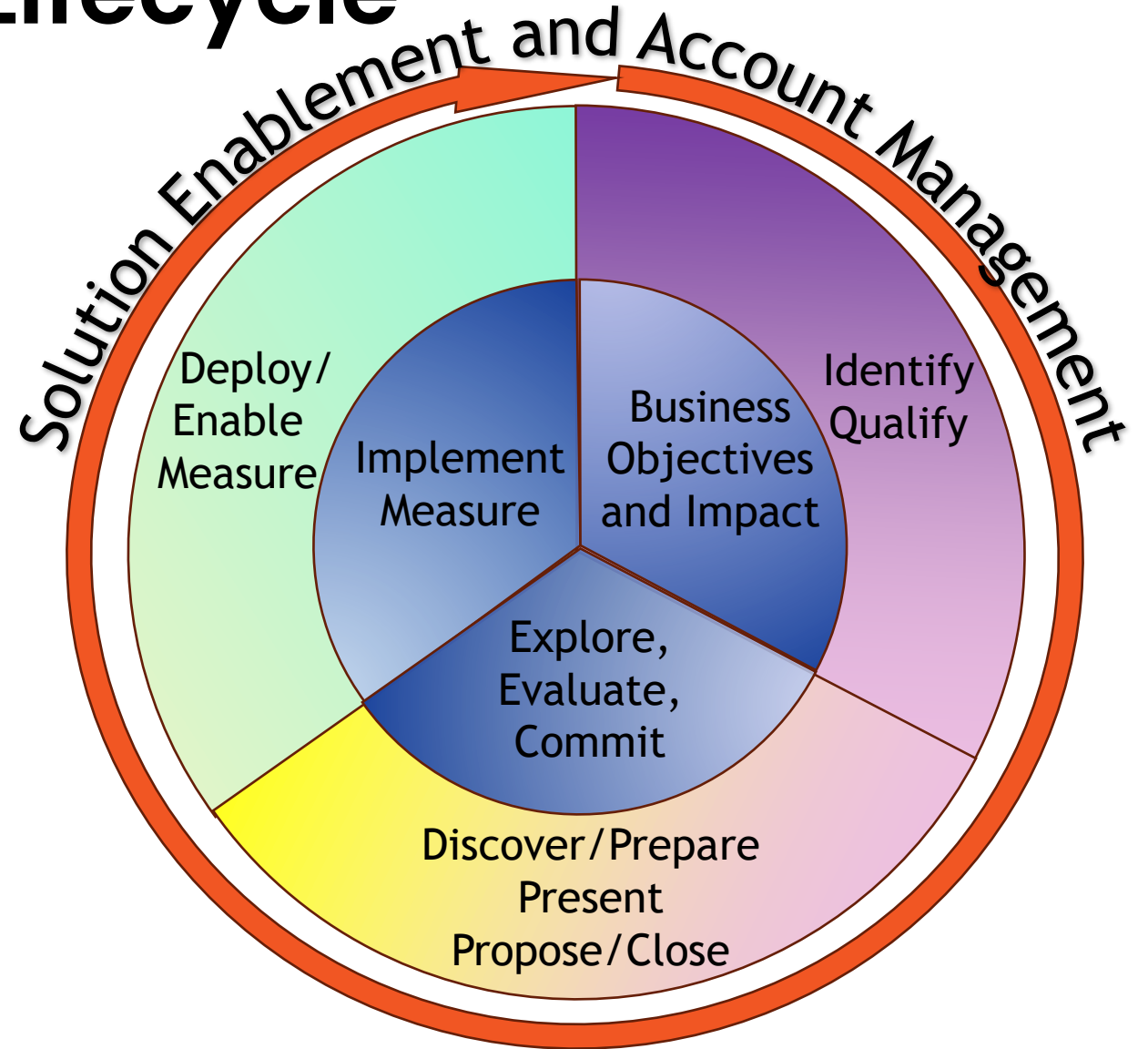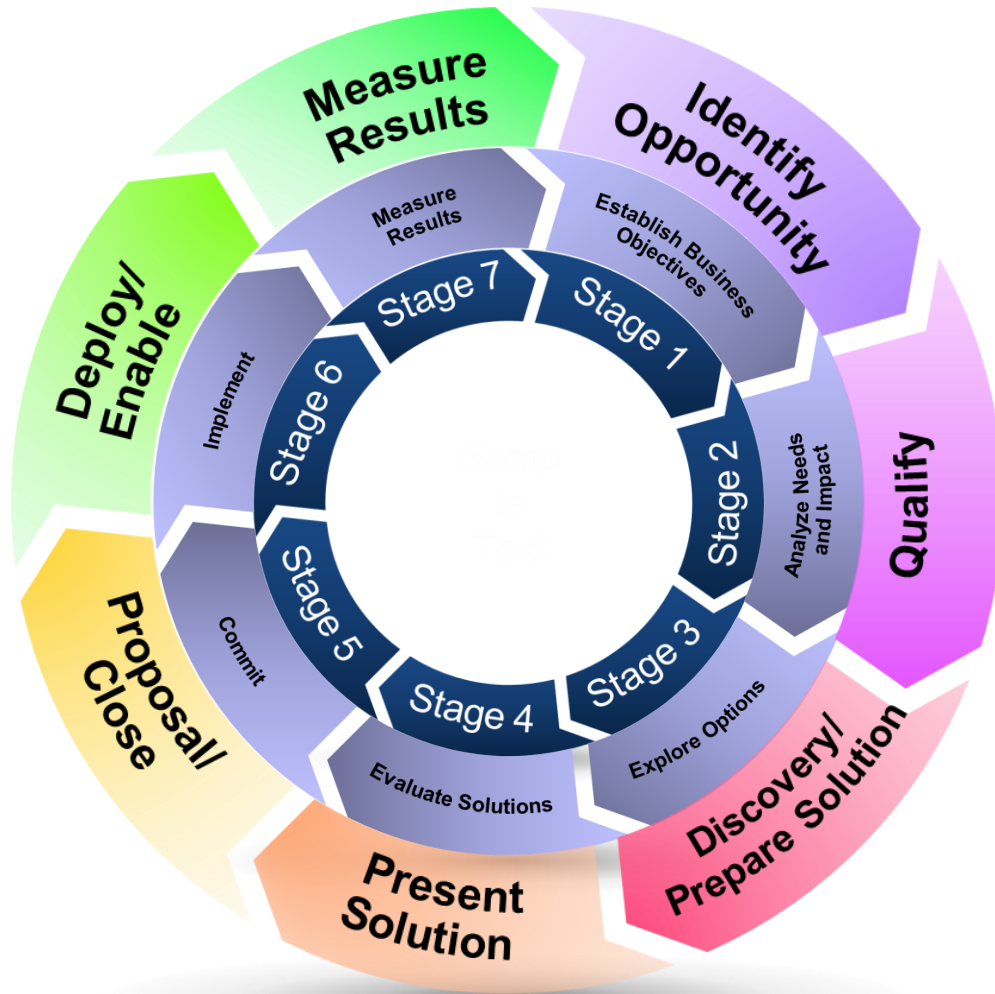
Evolution of Sales and Presales

- Focus on client success from hello to commission

- All client-facing roles aware and aligned

- SE and AM working as a team – equal parts with complementary functions

Client Wins – AM Wins – SE Wins

Thank You!

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PRESENTING

Evolution of Sales and Presales to support buyer enablement and client success

DEMOFEST
2024

Presented by consensus

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