



SEAMless Sales®



## **Making SEAMless Sales**

## **The Last Frontier of Sales Enablement**

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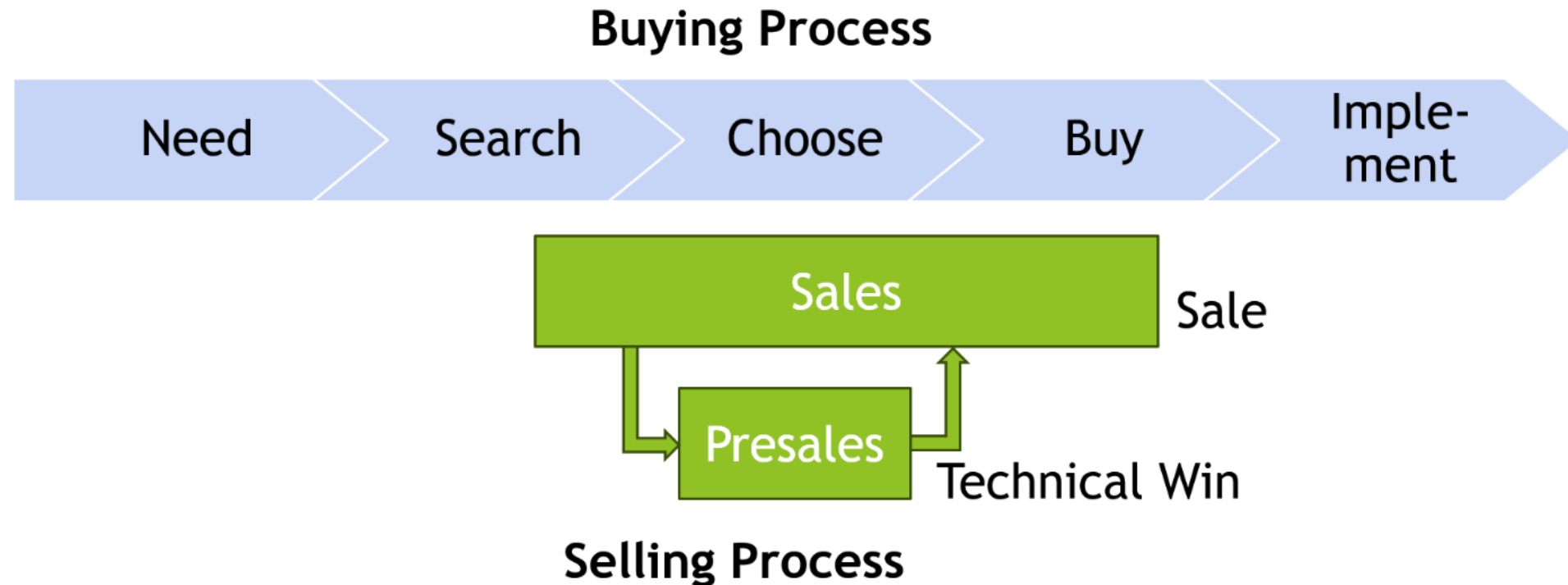
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# Objectives:

- Awareness of misalignment of presales (SE) and sales (AM) roles and how to align SEs and AMs for optimal performance.
- Realizing the importance of, and how to equip the sales team to be laser-focused on the client's buying process and key decision makers.
- Key actions to equip the sales team to work together seamlessly from hello to renewal, expansion, commission and recognition.

# Traditional Roles and Extent of Presales/Sales Engagement



**What factors prevent presales (SEs) & sales (AMs) from working together seamlessly? (up to three words)**

# **Factors That Prevent Presales (SEs) & Sales (AMs) From Working Together Seamlessly**

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Siloed departments and role and goal misalignment.

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Lack of understanding of the full buyer's journey.

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Inefficient and ineffective communication and collaboration.

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Lack of cohesion and partnership between SEs and AMs.

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Underutilization of SEs' business enablement expertise.

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Insufficient discovery leading to ineffective demos.

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Misalignment and overstretched resource allocation.

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# Impact of SE and AM Misalignment and Gaps



**For solution provider:**

**Lower win rates**

**Longer sales cycles**

**Reduced deal sizes**



**For clients:**

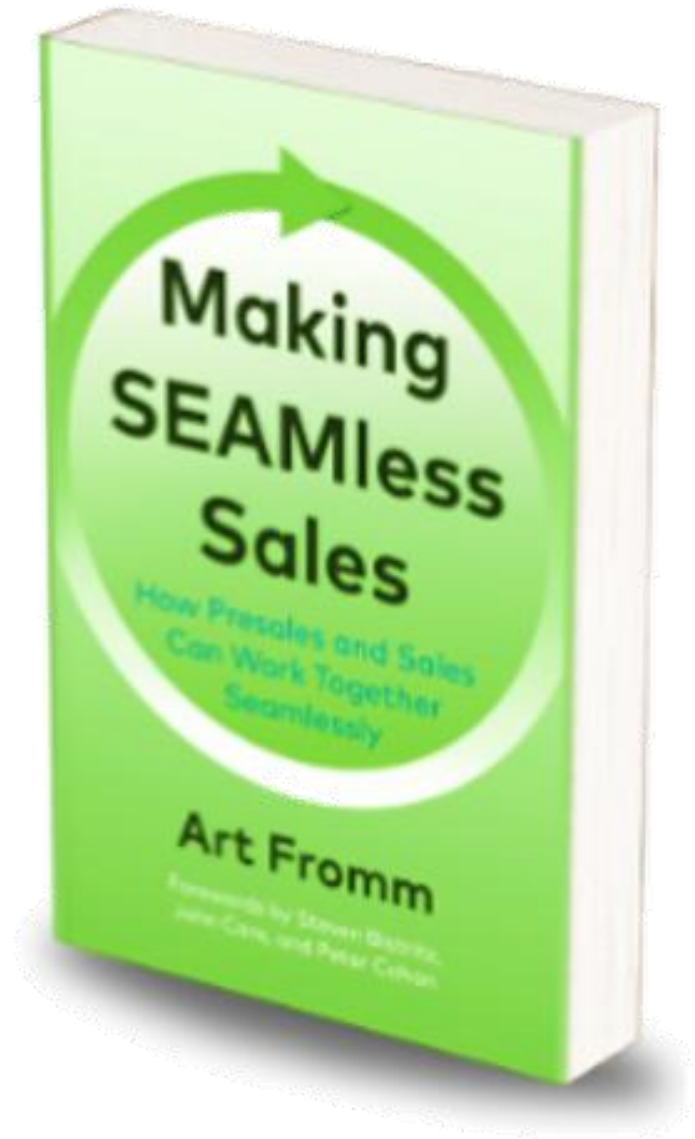
**Goals not achieved**

**Friction in engagement**

**Diminished trust**

**Studies by Salesforce, PreSkale,  
SiriusDecisions, Dock.us, & other  
publications show that  
organizations who lack SE-AM alignment  
can have 15% - 38% lower win rates  
compared with those who are aligned.**

**SEAMless Sales®**  
is framework that enables  
presales and sales collaboration,  
alignment with the buyer's  
journey, and leverages the  
strength of SEs and AMs working  
together to drive client success  
and higher KPI achievement.

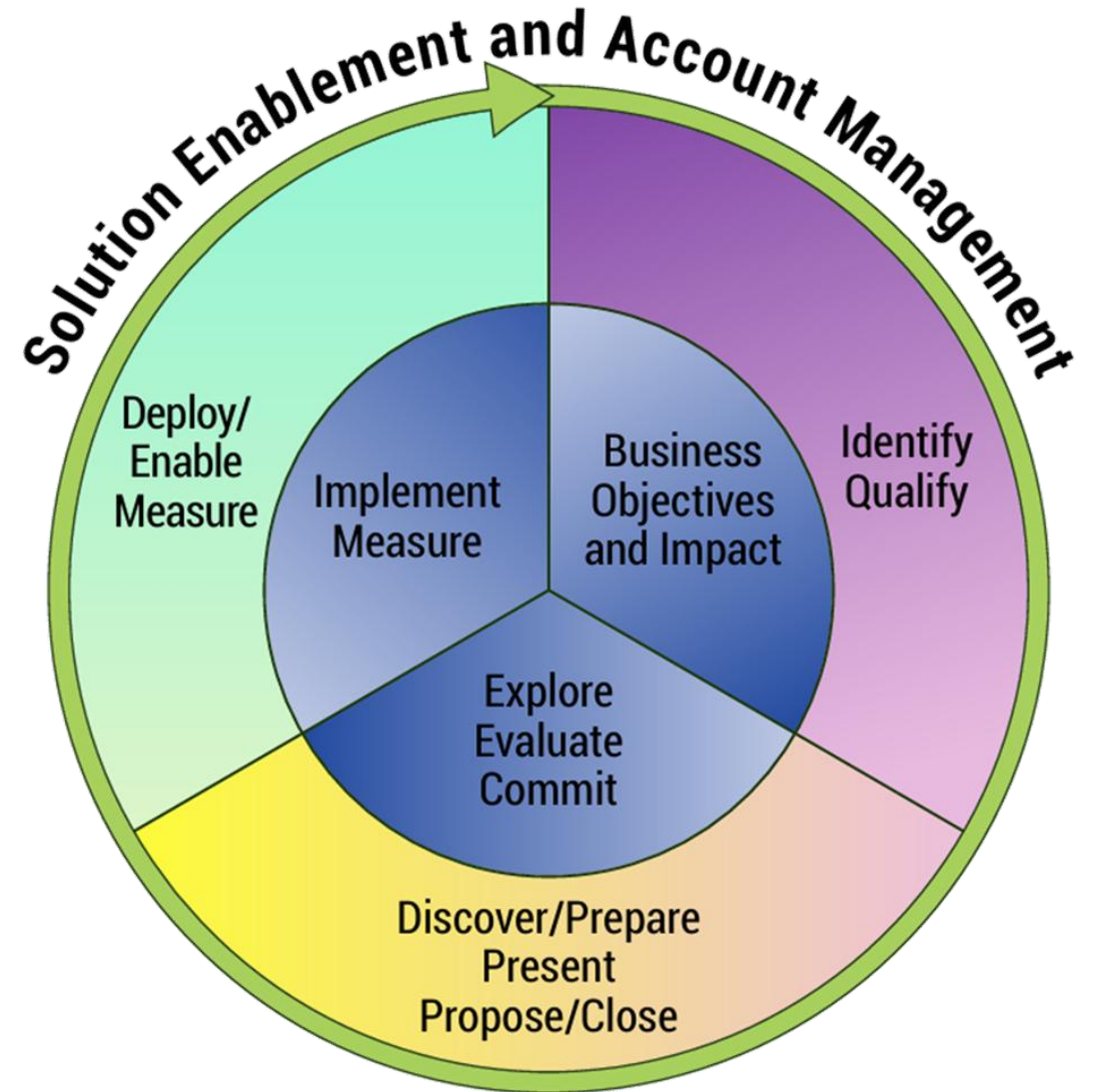
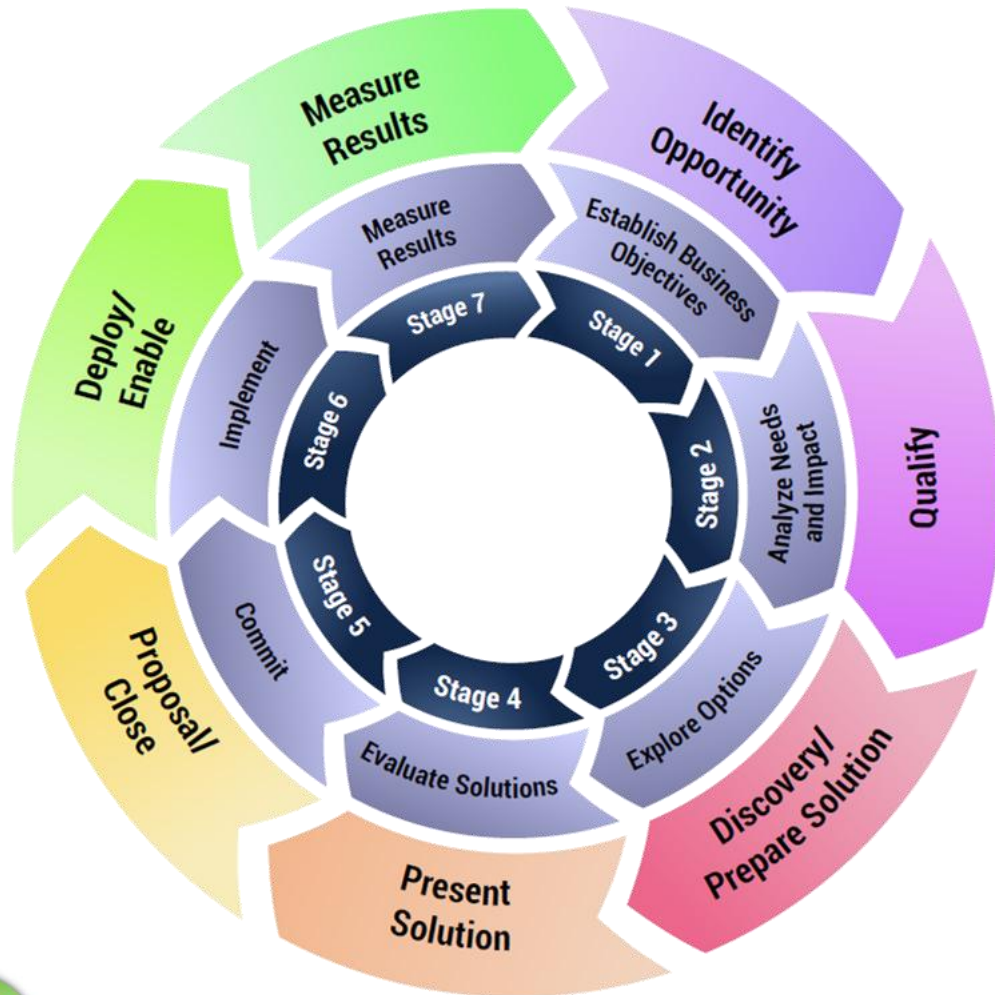


# Start With The End In Mind





# Buyer Enablement Lifecycle – SEAMless Sales®



# Two Key Types Of Stakeholders – BDM and TDM

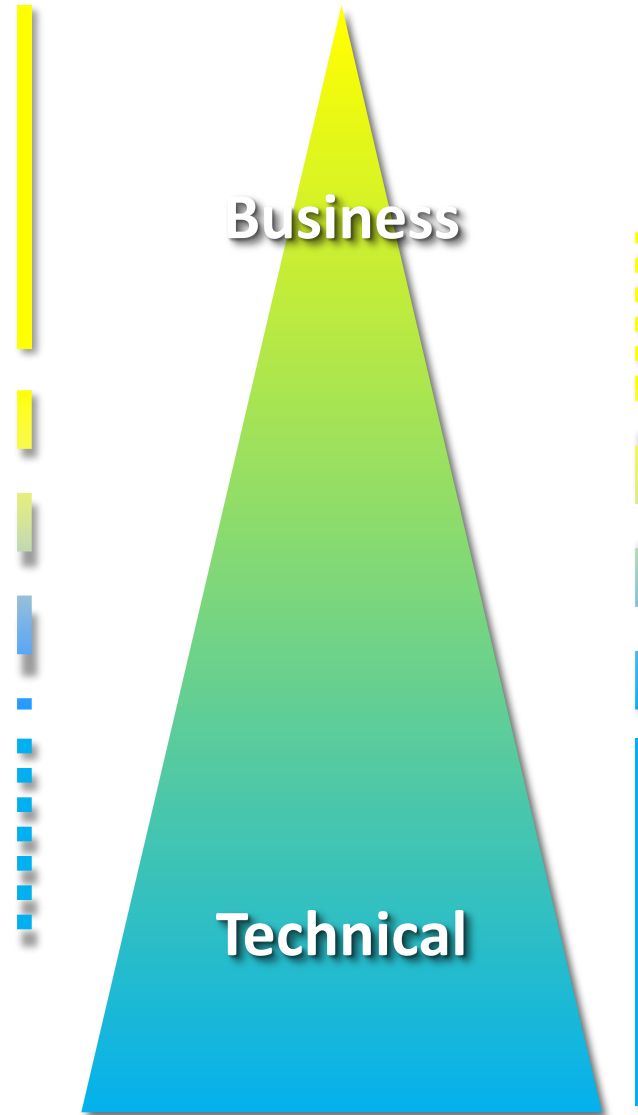
## Business Decision Maker (BDM)

- Focused on strategic external or internal business goals
- Is the beneficiary of the solution being provided
- May have high formal influence because of their authority
- May be able to influence procurement beyond pricing
- Is not interested in technical details – delegated to TDM

**Gets recommendation from  
TDM**



SEAMless Sales®

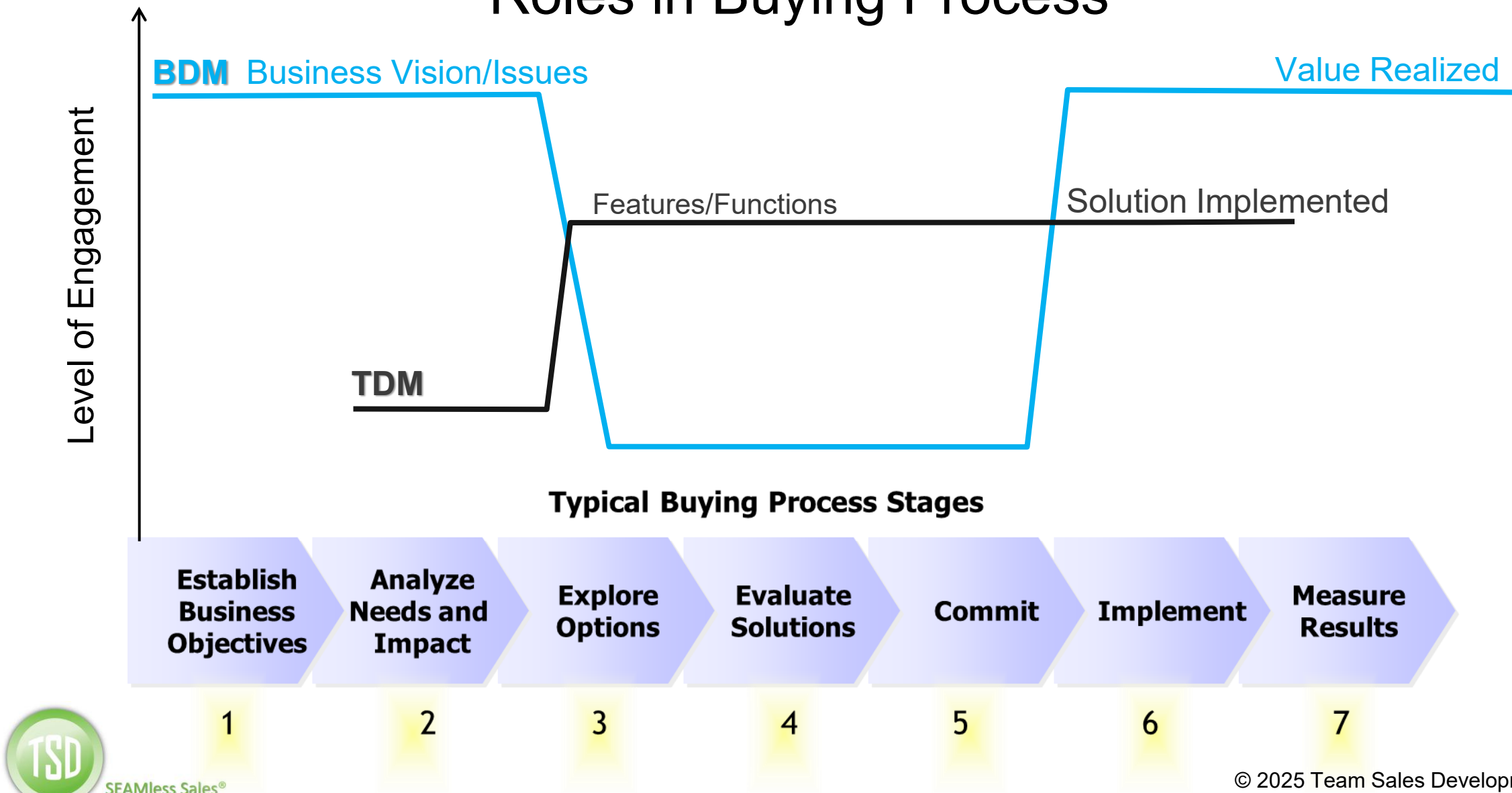


## Technical Decision Maker (TDM)

- Responsible for confirming the suitability of the solution to address the business needs
- May be delegated or executing a project defined by and supporting the business
- May be executing an internal IT project
- Deep understanding of technical issues and risk
- May be an individual or a group of individuals

**Recommends solution to the  
BDM**

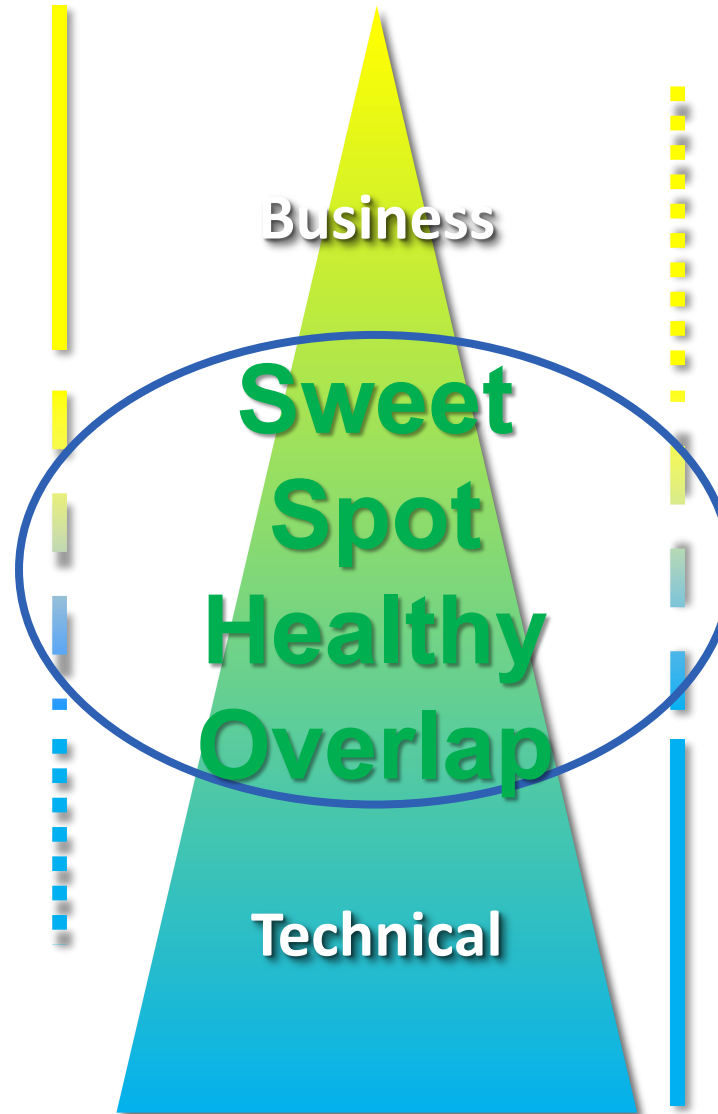
# Business Decision Maker (BDM) & Technical Decision Maker (TDM) Roles in Buying Process



# Areas Of Focus And Interdependence For Seamless Sales

## Sales/AM

- Account and opportunity strategy
- Deep understanding of business needs
- Relationship with key stakeholders especially the BDM and TDM
- Understanding of cost and risk perceptions we need to overcome
- Value of solutions
- Overview knowledge of solutions

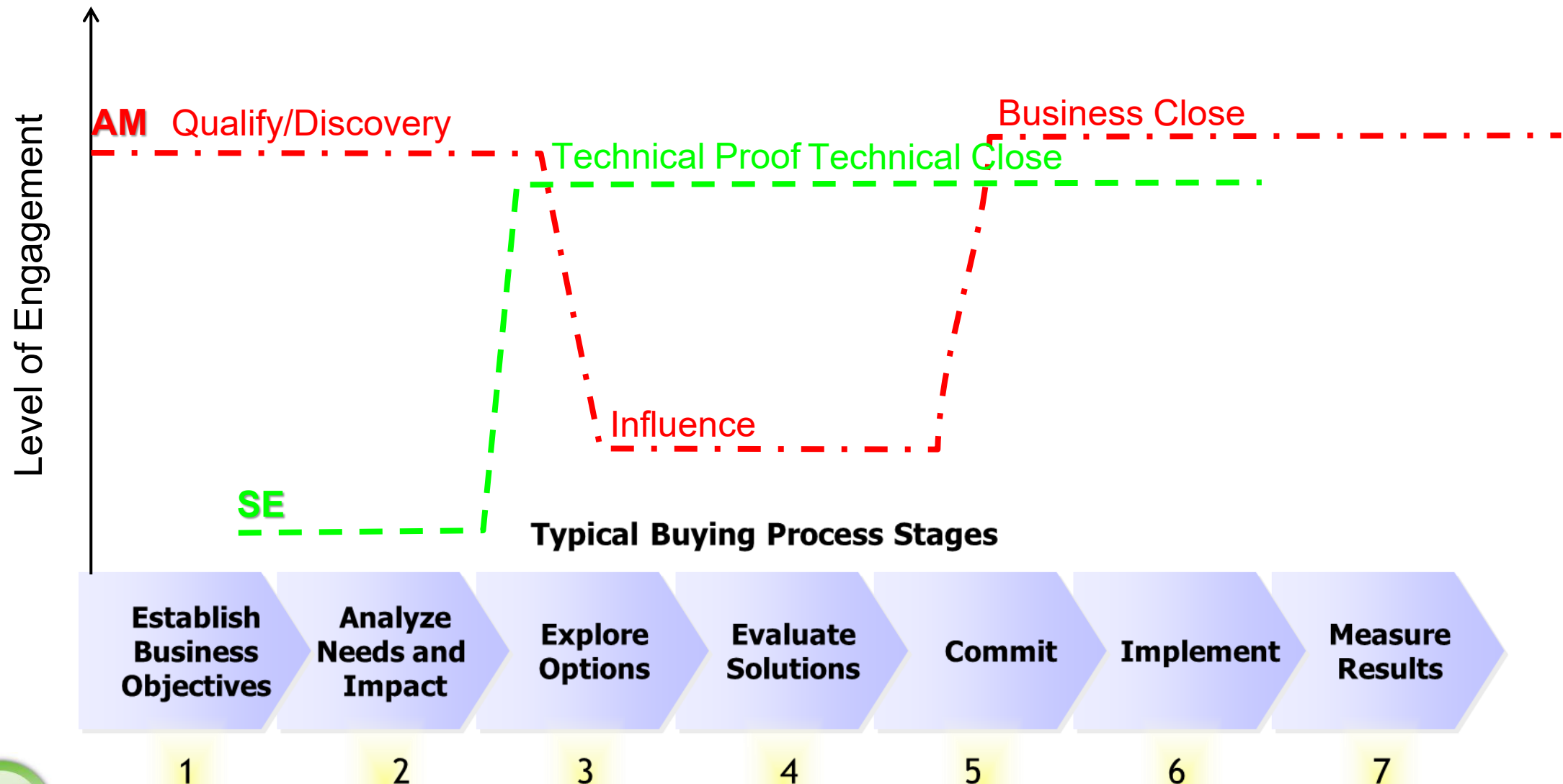


## Presales/SE

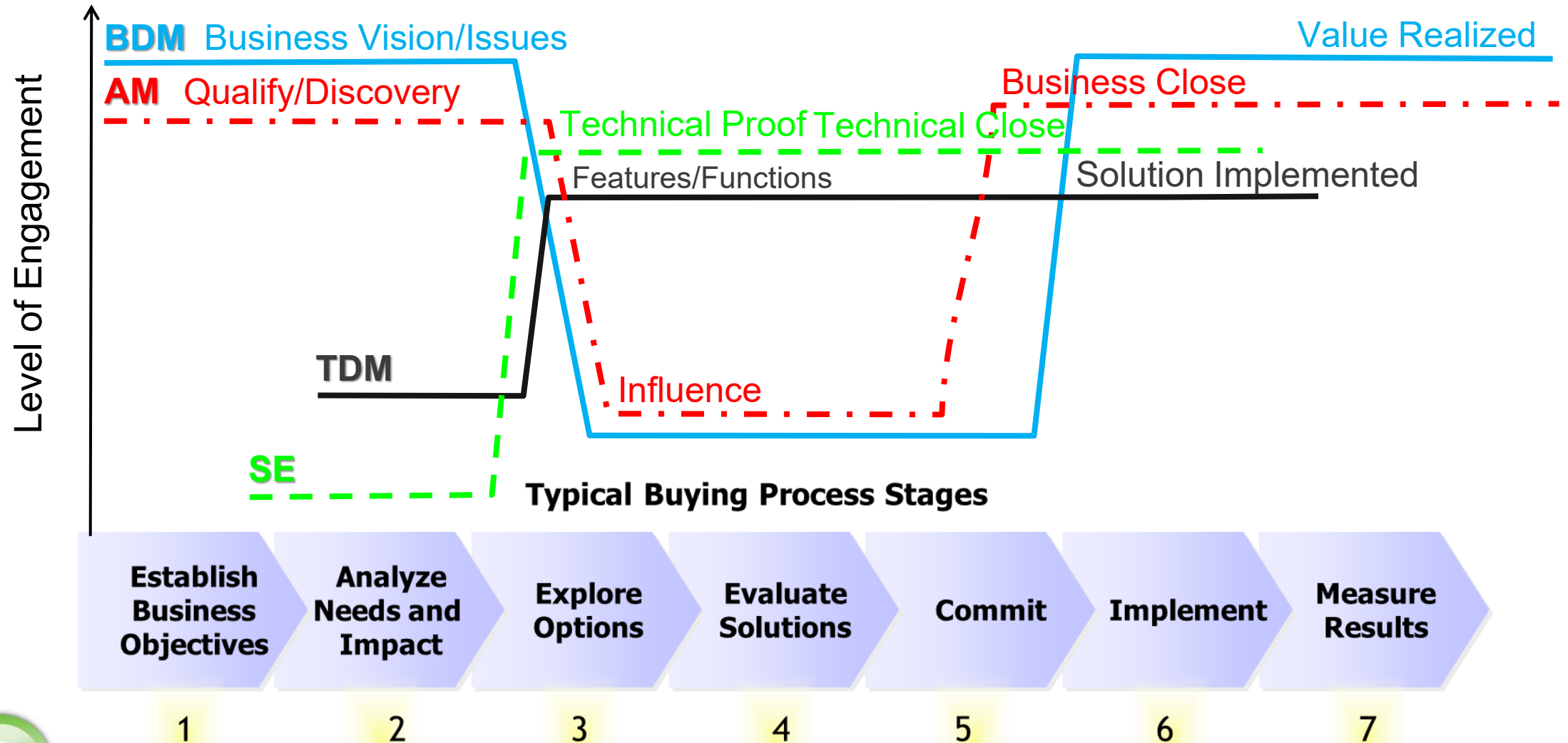
- Value of solutions for BDM
- Understand business needs
- Value of solutions for TDM
- Relationship with key stakeholders especially the TDM
- Features/ function/ benefits of solutions
- Deep understanding of technical needs



# Presales (SE) & Sales (AM) Roles in Selling Process



# Interplay of SE and AM with BDM and TDM Roles



# Primary Objective for the AM - Business Close



## The AM confirms that the Business Decision Maker (BDM):

- ✓ Agrees that the business outcomes will be achieved as a result of the project in conjunction with technical recommendation from the TDM.
- ⚠ Is satisfied that the potential business risks are addressed.
- \$ Confirms that the investment or commitment to proceed is justified.
- 📅 Commits to move forward with this project within a set timeframe, at the exclusion of other projects or priorities, including do nothing.
- 👏 Compels the approver or person who can commit funds/resources to sign off on the project.



# Primary Objective for the SE - Technical Close

**The SE confirms that the Technical Decision Maker (TDM):**

- ✓ Agrees that the solution meets the technical requirements in support of the business goals.
-  Commits to select, implement, and use the solution at the exclusion of the alternatives, including competitive offerings and status quo or do nothing.
-  Recommends implementation and long-term use of the solution to the BDM.



# Role of Sales - Account Manager/Account Executive – “AM”

Lead	<b>Lead the deal strategy and drive to closure or commitment to consume.</b> <ul style="list-style-type: none"><li>• Overall account and relationship management – client and internal team.</li></ul>
Qualify	<b>Qualify and ensure mutually beneficial outcomes.</b> <ul style="list-style-type: none"><li>• Should we pursue this opportunity?</li></ul>
Discover	<b>Discover client needs and alternatives being considered.</b> <ul style="list-style-type: none"><li>• Can we effectively compete for this opportunity?</li></ul>
Influence	<b>Impact decision process and influence stakeholders.</b> <ul style="list-style-type: none"><li>• Can we reasonably expect to win this opportunity?</li></ul>
Collaborate	<b>Collaborate with and support presales working as a seamless team.</b> <ul style="list-style-type: none"><li>• Work together to align the technical solution with the client’s desired business outcomes.</li></ul>

# Role of Presales - Sales Engineer/Solution Consultant – “SE”

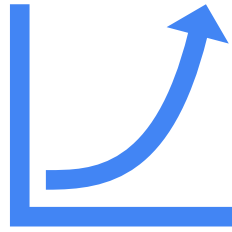
Engage	<b>Build client trust through consultative selling.</b> Avoid feature-heavy demos and focus on client outcomes.
Advise	<b>Provide technical expertise and solution design.</b> SEs act as the glue connecting solutions with business needs and outcomes.
Discover	<b>Analyze and confirm technical requirements.</b> Conduct detailed discovery to align proposed solutions with prospect needs
Demonstrate	<b>Deliver demonstrations and presentations.</b> Deliver prospect-specific demonstrations showing how the solution solves client challenges.
Transition	<b>Bridge sales and client success.</b> Transition chosen solution to customer success team to ensure client satisfaction.

# Actionable Takeaways:

1. Sales needs to be laser-focused on the buying process and client success from “hello” through to commitment and value realization.
2. The goal is to transform from a sell to a buy and a push to a pull.
3. The buying process and sales process are a continuous loop, not a linear once and done.
4. The overarching function of the provider is Solution Enablement and Account Management for the buyer.
5. The stakeholder(s) who have the role of Business Decision Maker (BDM) and Technical Decision Maker (TDM) are key influencers with whom we must align and support.
6. Presales (SE) alignment with the TDM and the sales (AM) alignment with the BDM leads to SEAMless Sales and a frictionless buyer experience.
7. Working together seamlessly as a SE-AM team from hello to renewal, expansion, and commission leads to higher commissions and recognition.



# Impact of SEAMless Sales®



**For solution provider:**

**Increased win rates**

**Shorter sales cycles**

**Increased deal sizes**



**For clients:**

**Goals achieved**

**Frictionless engagement**

**Enduring trust**

**Client Wins – SE Wins – AM Wins**



# Thank You!

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