“Selling” Discovery

“Just show me a demo,” the client begs.
“I need you to show them a killer demo,” the sales Rep demands.
As an SE, how do you respond?
As a sales rep, what are the implications?
As a manager or sales enablement, what can you do to help?

The prerequisite for presales to deliver a proper technical proof of capabilities Great Demo! is great discovery. Discovery is the fuel that makes a Great Demo! run. But what if you’re asked to “Just show a demo!” It’s tempting to comply. We love to show our stuff and are good at it. But it begs the question: What should we show, and why would the audience care to see it?

To do a proper, concise, impactful demo, the sales team must agree on the importance of doing discovery. We need to ensure that the client (or the sales rep, or both) agrees and realizes that doing discovery is good for them. Unfortunately, time and again, as I facilitate workshops such as Great Demo! or my TSD workshops, I find that resales teams are frustrated because they are not receiving proper discovery information or being given the opportunity to do as much discovery as desired.

Consider this email from the VP of presales after a recent Great Demo! Workshop I delivered for their team:

> “Hi Art, thanks for a very impactful Great Demo! Workshop!
>
> “Do you have an article or presentation/paragraphs that I can put into an email to our Account Managers that explains the importance of discovery? Typically, we’re either not getting enough information from them (or the CRM System), or the information we’re getting is vague and not helpful, yet they expect us to ‘Do a Demo!’
>
> “I ‘borrowed’ some ideas from Great Demo! articles to get started. This is what I have so far:
>
>> The SE needs to know the customer’s situation to deliver an effective demonstration!
>>
>> For the Great Demo! approach to be successful, there needs to be a more significant emphasis on discovery and preparation before the demonstration. We need to understand what the client is trying to accomplish and their Critical Business Issues (CBIs). We organize the demo around the CBIs. There is a spot for CBIs in the demo request - please fill those out. ‘Customer needs to see a demo’ is not a Critical Business Issue! We need to understand why they want to see a demo, what problem they are trying to solve, and the value they will receive.
>
> “We’re asking the AMs to not lead with the offer of a demo but instead with a conversation that will help us better understand the prospect’s situation so that we can use the prospect's time wisely and present a custom agenda focused on their issues. Then, we can put the situation slide together as a team based on the discovery, allowing the AM to open the meeting by presenting the situation slide, followed by an Illustration of how we solve the issue for the prospect. This will set the stage for a proper demo delivered by my team.”

Does this situation sound familiar to you? As an SE? As a sales rep? If you’re in sales enablement, are you aware of this? I hear it all the time, even in companies where they have made major investments to supposedly upscale sales on qualification and discovery methods. There’s a significant need to double down on presales and sales - the SE and AM – working together more seamlessly to focus on and do discovery.

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The VP of presales was off to a great start regarding the importance of discovery and how discovery feeds the Great Demo! methodology and produces the best outcomes. It was his query that led to creating this article initially.

Often, we need to sell two constituents on the importance of discovery:

1. Internal customers of presales such as sales/AM, including partners or others who request demos.

2. The client.

To convince the client to let us do discovery, we need the support of the AM. Then, we can work together to convince the client.

In this article, we’ll explore three approaches presales can use to ensure that sales conducts proper discovery:
- The vision generation Demo
- Selling discovery to the sales team
- Selling discovery to the client

The Vision Generation Demo

Ideally, sales should do explicit discovery before every demo. One “rescue” technique if you need to do a demo with little or no discovery is to deliver a vision generation demo. Those of you who’ve been through Great Demo! with me know about this in some detail. For those unfamiliar with vision generation demos, the idea is to give a little to get “some discovery” when lacking information, thus avoiding the dreaded harbor tour. Engaging with little or no discovery is not ideal, but vision generation works wonderfully. (By the way, I have taught many of my client’s SDRs and BDRs this method to start the conversation with a new client quickly and effectively. This method is also beneficial for low-touch/high-volume sales teams).

Vision generation utilizes a “give to get” approach. We use an existing client situation as the “give.” The presentation starts with a summary of what “Others like you have said” (based on the client’s job title and vertical) and proceeds with an interchange of asking, “How does this compare with your situation?” and getting the client’s input to determine whether to proceed with the presentation or demo that was planned, pivot or come back later with a presentation or demo that addresses their specific situation.

“Selling” Discovery

The benefits of the vision generation approach are:

1. It’s quick and easy to “do (some) discovery” even if the client doesn’t want to. Thus, we can discover enough to do a proper technical proof of capabilities Great Demo!

2. We gain or build credibility by sharing what we’ve done for others and allow the client to compare that with what they need to do, showing empathy for the specifics of their situation (…and we get to do discovery).

3. We offer social proof and generate FOMO (Fear of Missing Out). The client should feel a sense of, “Oh, others are doing this, then I guess I should too,” and “Oh, if others are doing this, I better catch up, so I don’t miss out,” which should drive interest, and generate a “pull” and engage them further, rather than us having to “push” (…and we get to do discovery).

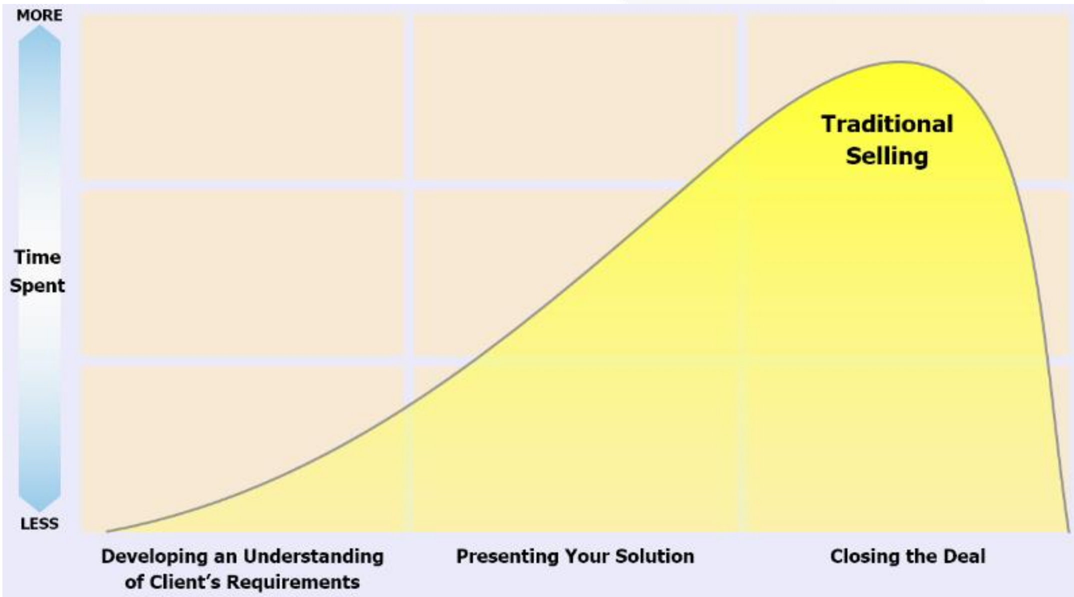
<u>Selling the need for discovery to the AM</u>

It is critical to schedule and conduct one or more dedicated discovery sessions before presenting any specific solution for larger opportunities, more complicated decision processes, and more complex solutions. Unfortunately, all too often, AMs would rather not do discovery if it can be avoided.

Why don’t AMs want to do discovery? Discovery requires sales to do challenging work, but unfortunately, they often perceive this as slowing down the sales process. Still, when done properly at the beginning of the engagement, discovery makes the rest of the process much more efficient, often leading to shorter sales cycles, bigger deals, higher client satisfaction, and higher Annual Recurring Revenue. Usually, sales may have gathered a nominal amount of discovery information. Sometimes, it isn’t shared; other times, the discovery is insufficient, and the information provided is too vague or just low-level solution-requirements-focused, leading to an undesirable Harbor Tour.

"Selling" Discovery

A consultative selling approach such as the Sales Opportunity Snapshot® methodology that I deliver, with proper qualification and discovery, can help turn around this dire scenario, where all of the work comes late in the process, often driven by responding to RFPs or RFQs…



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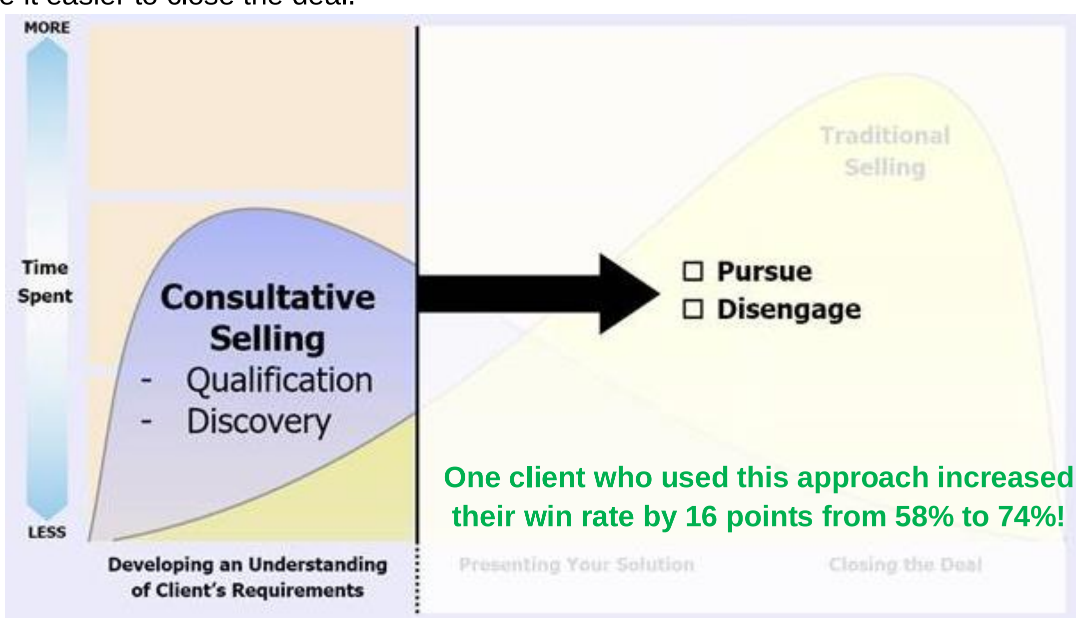
…into this more desirable outcome where the salesperson does proper qualification and discovery upfront, allowing us to decide if and how we want to proceed, and then, if we do, make it easier to close the deal.



“Selling” Discovery

For the sales team, win rate and sales effectiveness are directly tied to proper qualification and discovery, which contributes to everyone’s success and should convince sales of the importance of doing discovery. So, when there is resistance to doing proper discovery before delivering a demo or presentation, presales should “sell” the need for discovery, justifying the investment in a “help me help you” fashion.

Here are some ideas to help sales realize the benefits they’ll get from doing discovery, which will provide the presales team with what is needed to do a proper technical proof of capabilities demo.

1. Encourage sales to share information gathered before presales involvement, including access to qualification and CRM data. When done correctly, a good amount of discovery happens in qualification before presales involvement, and sales should capture that information in the CRM system. So, at a minimum, when presales gets engaged, check your CRM and upstream sales counterparts – SDR, BDR, AE, or AM. They may have information you didn’t know existed. The expectation should be set that this is valuable information for all downstream sales touches, and the salesperson should share it accordingly.

2. As a team, transition the approach from a sell to a “help them buy” and turn the decision from a push into a “get them to pull.” Although it takes more time “up front,” discovery increases the “pull” from the client. It aids in their buying process through insightful questions and helps the client think about adjacent or related areas they may not have considered, leading to upselling, cross-selling, and, thus, larger and more sticky deals. I like to say, “Selling begins in discovery” because we can “lead the witness” to a mutually beneficial set of technical and business requirements based on individual stakeholder needs, informed by the insights we provide. This is much more effective than trying to “push” a solution, which is what happens when we “show a demo” (i.e., harbor tour - yuck!) without doing discovery.

3. Gently push back with a “yes and…” response. When I was an SE, a sales rep asked me to “Do a demo” for a large client but provided no other information, so I told him, “Yes, and I’d need three days to cover everything we offer.” 😊 He quickly got the point that we’ve got too much to show potentially. We worked together doing three or four discovery meetings and learning exactly what the client required. When the client finally saw our solution, they confirmed it was exactly what they wanted. Unless the salesperson spends time on discovery, we’re relying on the hope that we will somehow magically show the right stuff that will address some undisclosed or uncertain needs, and the client will figure it out on their own and decide to buy something. This is a fatal flaw, typically resulting in

"do-nothing," "no decision," "status quo," or "stalled deals," which translate to wasted time, client and sales frustration, lost deals, and a low win rate.

4. Get an agreement between presales and sales management for what presales needs and what presales can deliver accordingly. When I was an SE manager, we had an agreement with sales management that we'd provide presales support commensurate with the amount of the information supplied by the sales team (at the time, we were using MEDDIC.) If they provided basic information, we'd give basic support. We needed more complete information for a technical proof demo, including a fully developed CRM record with the MEDDIC information properly filled out. As a result, sales was more motivated to find the information (i.e., do discovery), and the SEs got what they needed to accomplish technical close and move the deal forward – win-win!

If you're a sales rep, ask yourself these questions: Do you feel you're not winning as many deals as you should? Are you wasting time trying to sell or push, living in the land of hope using a spray-and-pray approach, and getting marginal results? What is your conversion rate? How can discovery help you help your presales counterpart be more successful, more efficiently taking down quota and achieving higher client satisfaction, resulting in more revenue and commissions?

Selling the Need for discovery to the client

Once the AM is bought in and assuming the opportunity is qualified and worth pursuing, here are some ways sales and presales can work together to "sell" the importance of discovery to your clients and evaluate the response to determine how to proceed in the event they demand that you "Just show a demo!":

1. "Help me help you" – Get the client to understand that to not waste their time (or ours) and enable the sales team to give them the most useful information that guides them with their decision, they must let us know what they are doing, what they would like to do, and where we potentially fit. We need to clarify that while we could present a demo, we'd only be guessing without discovery, which doesn't work well for anyone in our experience. Hoping that they'll "connect the dots" will fail almost every time, and we only have one shot at a first impression.

2. At a minimum, ask your client for a "pre-demo" call, which will allow you to find out about what they're doing. You may be surprised how quickly this turns into full and proper discovery, so be prepared with your questions. We used to do this all the

time when we didn’t have enough information, under the guise of confirming demo “logistics,” and got a wealth of information.

3. Ask them for one or more dedicated discovery calls so you can prepare the “right-sized” demo specific to their needs. In Great Demo! fashion, the discovery outcome should be a “situation slide” summarizing the stakeholder’s critical business issues, problems and reasons, capabilities desired, delta (value expected), and critical date so we can present exactly what they need – and not waste your time or theirs. This is an excellent opportunity for presales and sales to partner together and will also allow sales to qualify the opportunity further and increase the probability of moving the deal forward.

4. Customers often utilize an RFI/RFP/RFQ to get us to respond to them. Consider using an “RFD” – Request for Discovery” (I just made that up) - to initiate discovery if they’re willing (best case). But if they are unwilling, you can use the RFD to determine how serious the client is. If they don’t let us talk with them in advance, it may be a sign that:

   a) They are not ready to buy or not serious, in which case presales and sales should discuss and decide how to proceed, including potentially walking away from the deal.
   b) We’re “column fodder,” meaning they are just using us to leverage pricing or other demands from another vendor they’re considering or have already chosen. In this case, presales and sales should again discuss how to proceed, ranging from walking away to digging deeper to discover their motivations and intent.
   c) We’re engaged with the wrong stakeholder(s) or wrong level in an organization, in which case we should discuss how to reach the right level.

5. Use quid pro quo. As previously mentioned, the key to a vision generation demo is to give a little insight in exchange for initial information that should lead to deeper discovery.

6. Like the technique mentioned above regarding gauging our response based on how much information we receive from the sales rep, committing to invest resources, or showing a demo proportionate to the amount of information we get from the client. If they’re unwilling to give us the information, politely invite the client to avail themselves of information on our website, send them some collateral, including videos, or use a Demo Automation solution such as Consensus to deliver what they need without expending precious presales

resources. If the client is serious, they’ll be willing to put skin in the game vis-à-vis discovery.

7. Similar to the suggestion above for the sales rep, if a client asks you to “show me your solution” or “give me a demo” but won’t engage in discovery, make light of it by saying something like, “Do you have three days, so I can show you everything we’ve got?” We wouldn’t do that, but it makes the point that we won’t know what to show without properly scoping their needs.

8. Position the “discovery” as a free “process audit.” We used to do this quite often and very successfully. We carefully looked at the client’s workflows and bottlenecks. We documented what we found in a summary report along with suggestions for areas where they can improve (ideally including other areas outside of what they are thinking), with a bias towards our solution without mentioning our products. We used the summary report information to set the context and agenda for a proper technical proof of capabilities demo showing the key areas of impact. Sometimes, if this is “value add” enough, your professional services team can conduct a process audit as a business consulting service, charge upfront for it (again to see how serious they are), and then offer to reduce any project investment by the amount they paid for the process audit.

9. Offer the client an “RFP Template” or “Consumer’s Guide” to help them ask the right questions. This will help set the bar high and in your favor by listing or suggesting areas they should contemplate, biased toward your solution. Preferably, they’ll see the wisdom of engaging you and at least become reflective enough to be convinced that they need to improve.

Conclusion

In summary, sales needs to be convinced that discovery is the right thing to do for the sales team. Then, together as a team, you can collaborate with the client to do proper discovery, leading to a successful technical proof of capabilities. As the diagram above shows, spending more time upfront in qualification and discovery either confirms we should move forward (learning what we need to know in the process) or decide to disengage very early before we've expended valuable resources, which is tough to do. This allows us to focus on opportunities with a higher probability of winning.

A consultative selling framework, tool, and mindset, including qualification and proper discovery, will also increase margins, renewals, and customer satisfaction, making the sales process/effort more effective and efficient for presales, sales, and the client – a true win-win-win!

These are just a few ideas to get you started. I'd love to get your feedback and hear your favorite methods for ensuring we are doing discovery before delivering any technical proof of capabilities presentation or demo.

For more information, please contact Art Fromm here:

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