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SCALING PRESALES WEBINAR SERIES



Working Seamlessly as a Sales Team

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What We've Heard from Others...

- ▶ Presales/SE Frustrated with AM
 - ▶ Don't get enough or correct information to do tech proof
 - ▶ Involvement at last minute or with little time to prep
- ▶ Sales/AM Frustrated with SE
 - ▶ Just do the usual demo - it's what the Prospect asked for
 - ▶ Afraid SE "Will tell the truth" or "Say too much"
- ▶ Customer Frustrated with the Sales Team
 - ▶ Feels "pushy"
 - ▶ Didn't listen/disorganized/weren't helpful

Bottom Line Up Front

- ▶ As an SE you want to:
 - ▶ Use your time most effectively and efficiently
 - ▶ Move the deal forward - increase probability of win
- ▶ As an AM you want to:
 - ▶ Win more deals
 - ▶ Have Happier and Repeat/Renewal Customers
- ▶ As a Sales Team you want to:
 - ▶ Leverage the strengths of each other
 - ▶ Work together to Persuade the Prospect/Customer Buy

Start With the End in Mind for Seamless Sales

- ▶ **Customer is satisfied leading to recurring revenue**
- ▶ We made the initial sale/PO
- ▶ Prospect/Customer decides to purchase our solution
- ▶ SE delivers technical proof
- ▶ SE/AM does discovery - determines needs/outcomes desired
- ▶ Deal is qualified
- ▶ Lead is generated or received

Roles In The Buying Process

- ▶ Business Stakeholders
 - ▶ Approver
 - ▶ Business Decision Maker
 - ▶ "Relevant Executive"
- ▶ Technical Stakeholders
 - ▶ Owner
 - ▶ Implementer
 - ▶ Technical Decision Maker

Role of the Sales Rep and SE In the Process

What is the SE's Role?

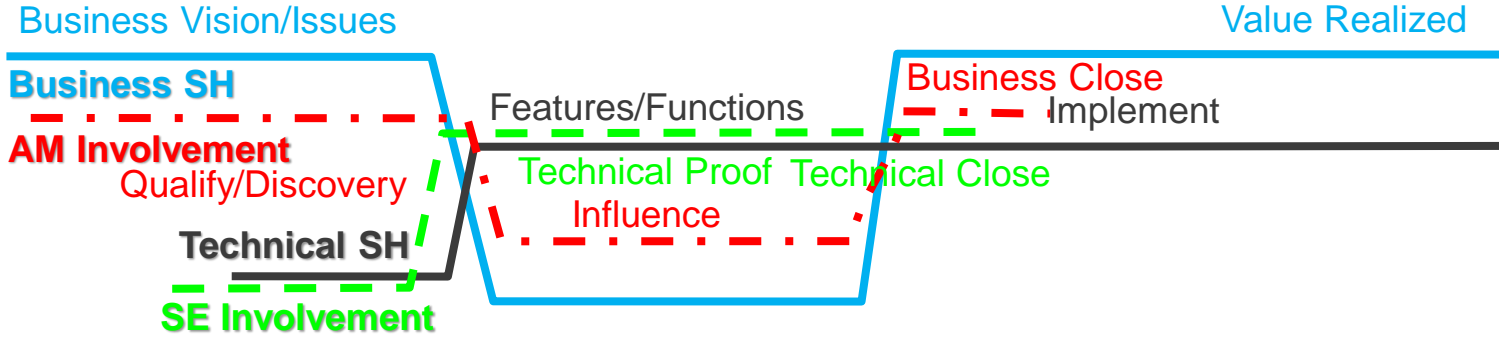
What is the AM's Role?

Process Alignment

Steps in the Client's Buying Process



Typical Sales Process



Steps in the Client's Buying Process



Typical Sales Process

SE Role - Technical Closure

The Primary Responsibility of the SE is to **Achieve Technical Closure** by Confirming that the **Technical Decision Maker**:

Validates that our Solution meets their Technical Requirements (Technical Win)

AND

Selects our Solution at the exclusion of the Alternatives

AND

Recommends our Solution and Articulates the Value to the Business Decision Maker

AM Role - Business Closure

The Primary Responsibility of the AM is to **Achieve Business Closure** by Confirming that the **Business Decision Maker**:

Sees the **Value** of our Solution in addressing their Business Needs

AND

Selects our Solution at the exclusion of other Business Alternatives

AND

Sponsors our Solution and the Financial Benefit to the Approver

Roles in Selling Process

Sales/AM

Account and Opportunity Strategy

Deep Understanding of Business Needs

Relationship with Business Stakeholders Especially the BDM and also the TDM

Value of Solutions

Overview knowledge of Solutions

Business

Technical

Presales/SE

Understanding of Business Stakeholder Needs

Value of Solutions

Relationship with Technical Stakeholders Especially the TDM

Features/Function/Benefits of Solutions

Deep Understanding of Technical Needs

Advice for Sales/AM's

- ▶ Do proper Qualification and Business Discovery, then engage SE
- ▶ Engage your SE in a way that maximizes their inherent Trust
 - ▶ “Divide and Conquer” Stakeholders
 - ▶ Asking questions, showing value, providing advice, challenging, confirming progress
- ▶ Let your SE know the Customer's situation when requesting help
 - ▶ Business Needs/Critical Business Issues
 - ▶ Value Desired and Opportunity Strategy
 - ▶ Competitive Landscape including overcoming “Do Nothing”

Advice for Presales/SE's

- ▶ Ask your Sales Counterpart for qualification and discovery information
- ▶ Focus on key elements that optimize your interaction and move the deal forward
 - ▶ Business Issue/Problem being solved
 - ▶ Value expected and when/how realized
 - ▶ Driving reason for change/Critical Date
- ▶ Use a “Help me help you” approach with Sales/AM

Advice for the Sales Team

- ▶ Work together to influence perceptions of Business and Technical Stakeholders
 - ▶ Technical Solutions Connected to Business Value
 - ▶ Risk of “Do Nothing” from Business and Technical Perspective
 - ▶ Total Cost of Ownership compared with Alternatives
- ▶ Work Together Top-Down and Bottom-Up and meet in the middle - Triangulate
- ▶ Collaborate on Strategy and Tactics

In Conclusion

When AM's and SE's work together for more SEAMless Sales® we will be able to:

- ▶ Help the Buyer through the process - move from “Push” to “Pull”
- ▶ Optimize interactions - For the Buyer - For us as a Sales Team
- ▶ Increase win-rate and customer satisfaction - move from “Sell” to “Buy”

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