

**Working Seamlessly as a Sales Team**  
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**One of the most confounding situations for everyone is when Sales, and sometimes the Sales Organization, doesn't inherently trust Presales to do all they can!**

While many Sales and Presales professionals have a great relationship, it never ceases to amaze me that although Clients inherently trust Presales, Sales doesn't always inherently trust Presales (or so it seems)! Before we jump to conclusions, this is often just as much the fault of Presales as it is Sales. Sometimes, Salespeople don't know how to use Presales best, or Presalespeople may act too technically or not appear as useful as they should be. It is helpful for both Sales and Presales to turn the mirror on themselves for introspection in the spirit of continuous improvement.

Let's look at both perspectives and ways Sales and Presales can work together better.

### **Salespeople aren't faultless**

Sadly, the AM doesn't always give the SE enough latitude or responsibility to be successful. Instead, they may do the following:

- Not do proper qualification or discovery.
- Not share or not enter into the CRM system qualification or discovery information they might have.
- Be reluctant to work with Presales strategically or collaborate regarding how to proceed.
- Doesn't know or share key elements about the Prospect's situation (such as the elements in the Great Demo! Situation Slide).
- Involve Presales at the last minute – well after the engagement has started.
- Fail to tell Presales much about the Client's situation or tell them precisely what to do or show without asking Presales for their input.
- Jump in during a Demo to try to look important or make it look like they know what they're talking about, which they think builds trust but inevitably derails the demo and causes Presales to lose credibility. (Peter Cohan calls this "Piling on.")

### **But Presales isn't faultless, either**

At the same time, because they tend to be more technical, Presales may act too technical or not know how to show that they are trustworthy. Instead, they may do the following:

- Can be shy or think it isn't appropriate to let the Salesperson know about their concerns regarding the account, opportunity, or stakeholders.
- Squander the Client's trust by not asking the right level or type of questions (i.e., too technical) or not listening intently enough when the Client is willing to tell them just about anything.
- Are reluctant to ask questions unless the Salesperson gets them engaged.
- Limit themselves to talking with the Technical Stakeholders.
- Only talk about or show technical aspects of the solution.
- Don't know how to leverage or build on the inherent trust of Clients fully.
- Don't express concerns about product/solution "fit"
- Agree to demos or POCs without proper information or time to prepare adequately
- Be resentful because they feel that they are doing "95% of the work" but "don't see any (substantial) commission."

Sales and Presales Teams must close gaps and build on their excellent opportunity for teaming together.

### **What about Presales makes them so trusted, and how can the Salesperson leverage this trust?**

Highly successful Sales professionals trust Presales and leverage the Client's inherent trust in Presales. Sales can do this by engaging Presales earlier in the process, sharing information, collaborating on strategy, and working together better as a true sales team. When Presales is appropriately engaged, they must use their implicit trust to ask relevant questions and develop relationships with key stakeholders. This works much better than two individual contributors trying to execute a sales process.

Successful Presales and Sales teams acknowledge each other's challenges and utilize their collective strengths, increasing their combined credibility for maximum benefit within the sales team and the Client.

### **A Mountain Climbing Analogy**

Have you ever considered what kind of teaming it takes to climb Mount Everest? What might that look like? See if you can identify how this applies to your role (Sales or Presales) and how you're performing, and also note your counterpart's role and how they're performing – these are all areas for improvement worth exploring.

First, let's look at the Mountain Climbers. They're always looking for the next expedition. They scour the land, looking for a challenge or opportunity to explore. They have the drive and risk tolerance to take chances and love to win and conquer the summit. Serious climbers often have funding and authority to utilize resources that can help them successfully make the climb, and they know that they must get the right expertise, advice, and guidance, or they could die. They don't want to have to figure out the detailed logistics along the way, and in many cases, they may not even have to know all of the details about the mountain if they have the right help. So, they hire sherpas (elite mountaineers and experts in their local area) and rely on the sherpas to equip and train them to get to the summit and back down successfully so they can go on to their next adventure.

The sherpas' job is to know the path forward since they see and interact with the mountain conditions in ways that the Climber doesn't or can't. They know the pitfalls and risks of preparing for, ascending, and descending the Mountain at a detailed level and work with the climber to ensure their safety and successful journey. Whereas climbers come and go, the sherpa is very familiar with the mountain. They have been up the mountain and back down to base camp multiple times with many different climbers in different situations. They know what works and what doesn't. At some level, they're one with the mountain. They have the expertise to get the climber to the top of the mountain, but they don't necessarily have to go all the way to the top, or maybe even shouldn't. Once the climber and the sherpa have worked together from pre-journey prep through the climb and back down again, the successful climber can move on to the next mountain, and the sherpa can get ready for the next climber.

### **Let's apply this to Sales and Presales.**

The Mountain is like the next sales opportunity, the Salesperson is like the climber seeking out the engagement, and Presales is like the sherpa.

The Salesperson finds or receives leads to pursue – like how a climber would google search or look up potential areas to explore. They have the drive and risk tolerance to investigate various opportunities – some bigger and riskier than others. Through proper Qualification and Discovery, Sales determines which opportunities are worth pursuing and quickly qualifies out those that aren't a good fit. They initially evaluate the client to confirm the situation and conditions. Sales can then determine whether they can proceed independently or need help. If they need help, they request a Presales resource as their sherpa to help them prepare for, work the opportunity, and successfully win.

The sherpa is well prepared to offer experience, training, and frameworks like Great Demo! to guide the way. Sales knows that they must team together and communicate to Presales the correct information to ensure they get the right level of expertise for that particular situation (mountain). They expect

advice about how to proceed and rely on Presales to deliver a successful Technical solution, or they could lose the deal. They don't want to have to figure out the technical details; in some cases, they may not even have to know the very deep technical details about the Client because they have presales who can guide the way that leads to success. So, they engage a Presales expert for any given Client situation, and they rely on Presales to deliver Technical Proof that leads to Business Close successfully (the summit) so they can go on to their next adventure.

Presales are like the sherpas. Their job is to know the path forward since they see and interact in ways that Sales doesn't or can't because of the inherent trust of the Client. They know the pitfalls and risks to the deal at a more detailed level than Sales, and they can help engineer influence. They have been engaged many times with a given Client or others like them and know the solutions that work. Once Sales and Presales have worked together on their journey through the engagement process, the Salesperson can be set up by Presales to close the opportunity successfully. Presales has the expertise to increase the probability of the Salesperson achieving Business Close (getting to the summit). Still, they don't necessarily have to, or maybe even shouldn't, go all the way through to deal closure, including contracts, etc. At the same time, Presales can return to base camp to prepare for and begin executing the next opportunity for the next Salesperson.

## **Conclusion**

To achieve a successful sale, proper Qualification and Discovery must be done to evaluate the situation and the goals. The climber and sherpa must work together to develop a deep understanding of the mountain terrain, conditions, weather, the ultimate goal and timing, and the steps needed to show progress and achieve a successful result. Similarly, Sales and Presales need to work together to determine the client's specific situation and expected outcomes and plan an opportunity strategy that takes into account the stakeholders, the flow of influence, the perceptions that need to be changed, and all other conditions that lead to a sale and ultimately client success.

When Sales and Presales work together this way, they are more successful, and that will result in happier and repeat Clients!

## **Call to Action**

What do you take away regarding the mountain climbing analogy related to your role?

What did you assess about yourself and your counterpart(s)?

What steps can you take to work together better?

Please let me know your thoughts and if I can further assist in planning and executing your next team expedition!

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