REVISION HISTORY			
REV	**Description of Change**	**Author**	**Effective Date**
V. 1.0	Pre Sales (Roles and Process)	Jashika Pattnaik	16-Sept-14
Rev.1.1	Added the Key performance indicators Added the Hierarchy	Pradyut Mohan Dash	25-Nov-14
Rev.1.1	Added section Co-ordination from BSS, Post Sales and Promotions (1.4)	Jashika Pattnaik	9-Dec-14

REFERENCE DOCUMENTS	
Document Number	**Document Title**

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1. BACKGROUND:

Pre Sales personnel help the sales personnel in a variety of functions in working towards an opportunity. It ensures

1. Provide end to end, consultations & technical support.
2. Deliver Business solutions & design consultations.

This role is especially crucial because the products and services are often heavily customizable and also because the requirements of different customers are often unique. The Presales professional thus understands what the customer needs, develops an initial view of the solution the customer needs, then tailors the product or service of his company to meet what the customer needs, explains (or helps sell) this solution to the customer, helps close the deal or sale and often stays on to ensure that the delivery team or product specialists that follow him provide the intended solution.

The document will explain on the objective of having a separate entity as Presales, its process and functionalities.

2. OBJECTIVE:

The Objective is to have detailed guidelines for the Presales team who would be dealing with the presales activities starting from hunting opportunities to its closure.

3. ROLES OF PRESALES SECTION:

The presales team has to perform the following jobs arranged serially, which would give an end to end complete adherence to the required quality principles.

3.1 Analysis of RFP

On getting the RFP for a project, the document is carefully analyzed to understand the requirement of the client. The necessary structure of the response to that RFP as well as the format of the response is gathered from the RFP.

3.2 Preparation of technical part of the response to RFP

The technical response to the RFP is prepared corresponding to the requirement of the client as asked in the scope of work. The technical response takes into account the requirements as well as the limitations in providing the solution. The response also includes the timeline, the technical and hardware specifications of the solution proposed.

3.3 Getting effort estimation from the BSS

As per the requirements mentioned in the RFP, a proposed solution is prepared and for that solution, an appropriate effort is estimated in collaboration with the BSS team. According to the estimated effort, the corresponding cost is calculated as well as the timeline for the project is prepared.

3.4 Analysis of request for EOI

On receiving a request for Expression of Interest, the document is carefully analyzed to know the requirements of the client. The necessary supporting documents for the submission are also identified.

3.5 Preparation of EOI

After the analysis of the request for Expression of Interest, the appropriate response is framed by providing all the necessary documents, similar experiences, best practices, etc. in the format as specified in the request.

3.6 Preparation of concept Note

A concept note is prepared to provide the requesting party with a proof that we have the conceptual capability and understanding to meet their requirements. A concept note is a very brief and concise document which showcases our understanding of the requirement as well as a conceptual solution in a crisp and precise manner.

3.7 Preparation of technical presentation with help of BSS

On submission of proposals in response to RFPs issued, many a times there comes a requirement to facilitate presentations based on the solution given. The presentation is prepared with the help of the development team providing the solution architecture and other technical details presented in an understandable manner.

3.8 Guiding IPD in the creation of graphical elements included in documents and presentations

It is always said that a picture worth thousand words. Thus, in many instances, graphical elements are provided to help the target customer/audience to have a better understanding of the concept provided, be it a proposal, concept note or presentation. Hence, to showcase such a requirement in the best possible manner, the IPD is roped in to provide the professional touch to the graphical elements.

3.9 Doing an initial analysis of the project scope while interacting with clients

The project scope is analyzed in details with the client by mutually inclusive interaction so as to have knowledge in the actual working and processes of the client. This helps in identifying the operational functionalities of the client for the solution to be designed and developed. Such an analysis also helps in identifying the modules for the solution and ensures that the solution to be developed is as close as possible to the need of the client.

3.10 Participating in pre bid conferences

The Presales members are also required to participate in pre bid conferences to ensure that the doubts and ambiguities are cleared as well as to get the general idea on the competitors for the bid and their concerns.

3.11 Preparation of pre-bid conference question and sending to the client

Sometimes, during the analysis of an RFP, ambiguities and doubts arise which need to be clarified by the client for the preparation of a perfect response to the RFP. Such queries are responded in pre-bid meetings. Thus, a questionnaire is prepared and sent to the client before the pre-bid conference as well as additional queries are prepared and asked if allowed to the client to get a clear cut picture of the requirement of the client in as absolute terms as possible.

3.12 Preparation of RFP for a client

On being sure of a hot prospect, Presales Team is requested to prepare RFPs for the respective client. The RFPs are prepared in a careful and calculated manner to ensure that on bidding for the same, we are awarded with the contract.

3.13 Preparation of Pre qualification Proposal

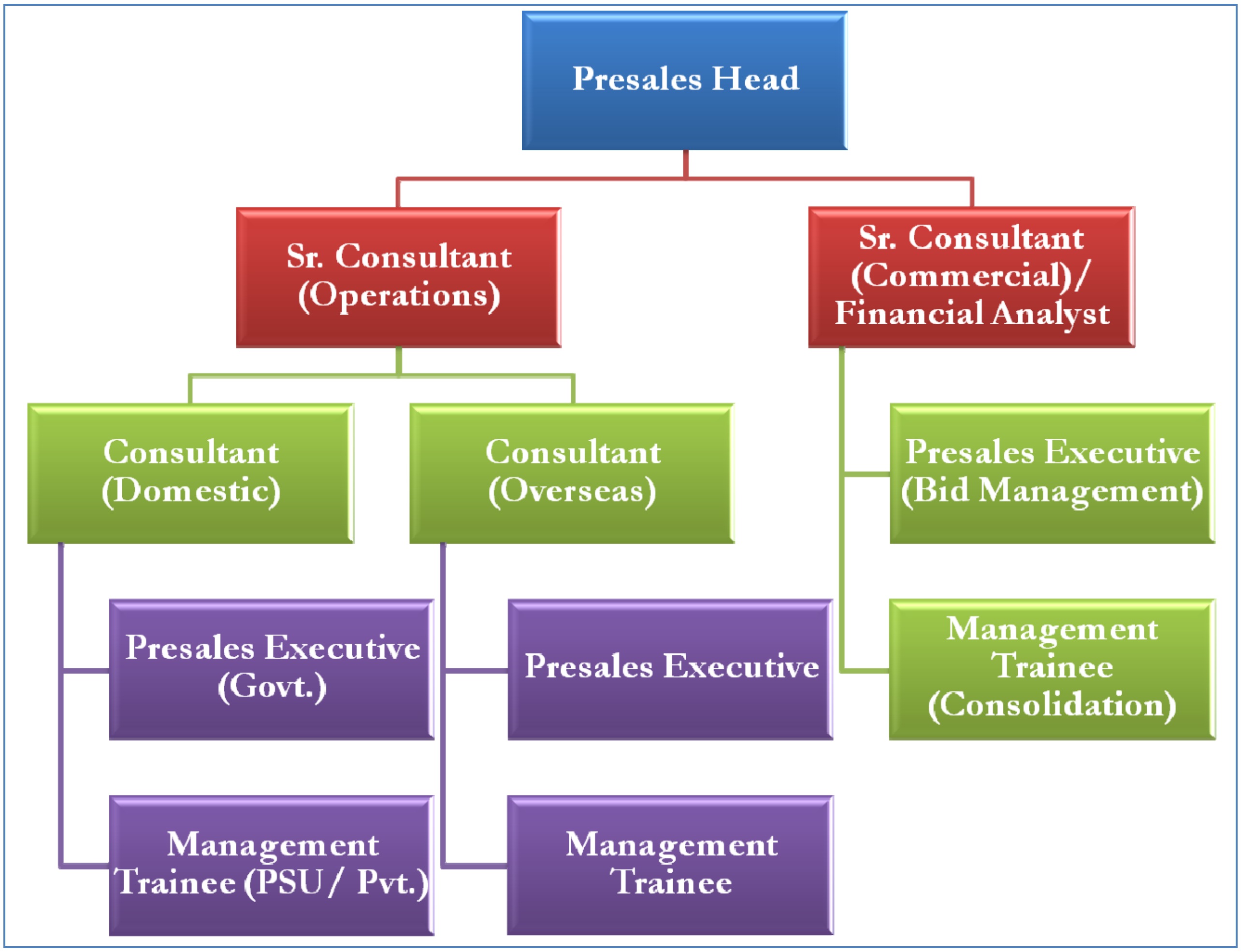
On receiving an RFP, the pre-qualifications part is also prepared to ensure all the criteria are met and all the necessary and relevant documents are attached to the response before submission.

3.14 Preparation of DPR

A Detailed Project Report is also prepared which includes comprehensive information on the project. The functional specifications as well as the technical specifications are mentioned in the document in details. The client information, scope of work and the solution proposed are the major items of the document.

4. TEAM STRUCTURE:

The proposed team structure is envisaged to be as follows –



5. JD OF THE TEAM MEMBERS:

Job description of the team members:

5.1 Presales Head

- To lead the entire presales and delivery department consisting of the presales and delivery managers, consultants and executives.
- Have review meetings with the aforementioned entities and monitor activities.
- Review work of the Presales executives and consultants post scrutiny by Delivery manager (Presales)

- Suggest and guide areas of improvement in the same.
- Have to give presentations to different prospects, clients in top priority projects and opportunities
- Need to understand the conomics of projects and work out the project cost to be used by Sales for project financials
- Have to monitor the progress of various projects and coordinate with the development team for timely delivery.

5.2 Consultant Presales

- To lead the Presales executives and presales consultants
- Report to the Presales head on activities management in the department
- Have to do technical writing, proposal aggregation, content editorial, bid management, concept notes etc.
- Have to give presentations to different prospects, clients and team members.
- Need to understand the economics of projects and work out the project cost.
- Have to monitor the progress of various projects and coordinate with the development team for timely delivery.
- If required, have to travel across locations globally for short visits [client visits].

5.3 Presales executive

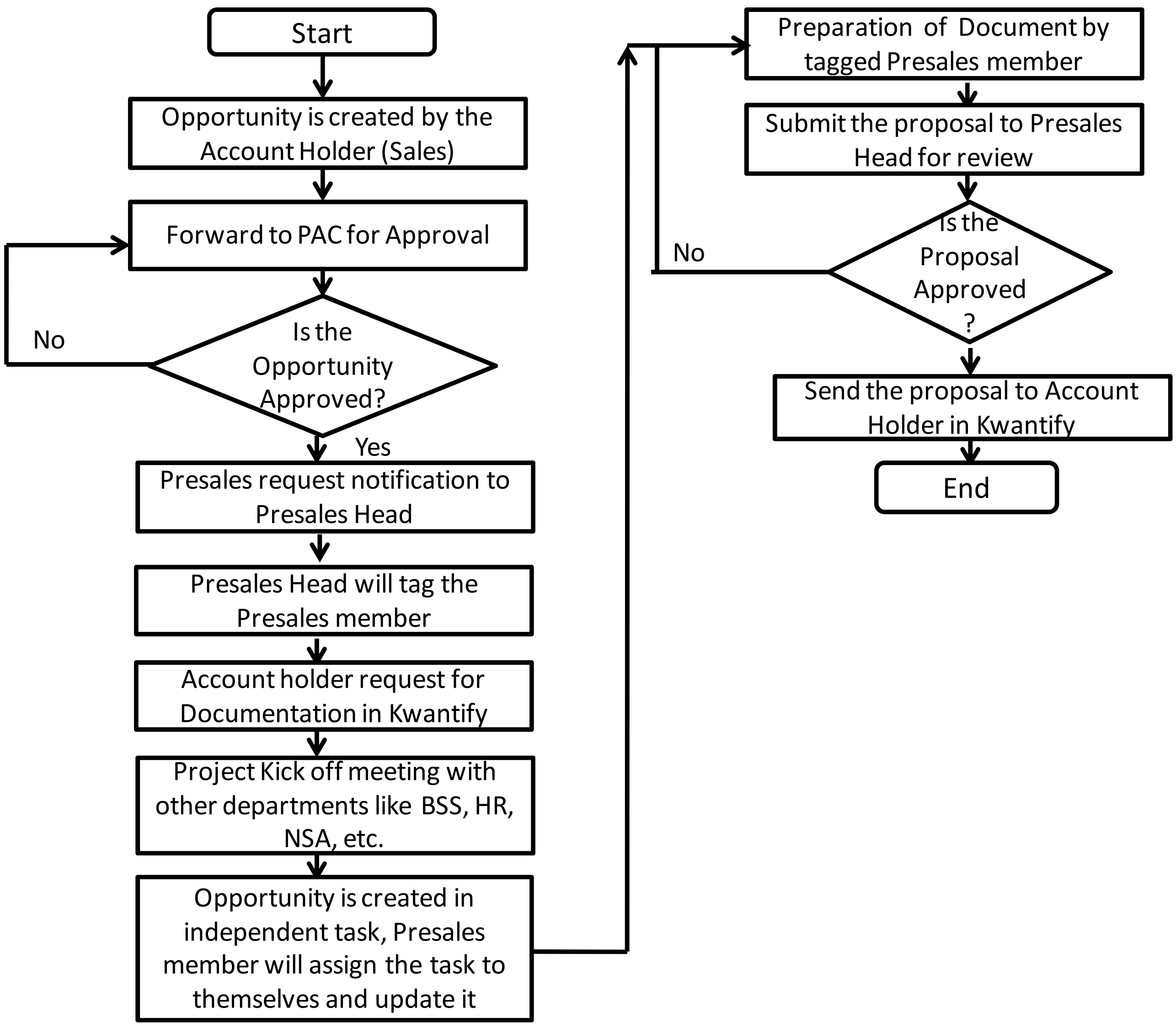
- Have to work on proposals with various SDLC models.
- Have to do technical writing, proposal aggregation, content editorial, bid management, concept notes etc.
- Prepare questionnaire for pre-bid and participate in Prebid for tenders
- Have to give presentations to different prospects, clients and team members.
- Need to understand economics of projects and work out the project cost.
- Have to monitor the progress of various projects and coordinate with the development team for timely delivery.
- If required, have to travel across locations globally for short visits [client visits].

5.4 Management Trainee

- Preparation of response to RFPs
- Preparation of response to EOIs
- Preparation of Functional Requirement Specifications/ Client Requirement Specifications
- Preparation of RFPs & Presentations

- Preparation of Concept Note
- Searching for opportunities from sources like Newspaper and Govt. tender websites.
- Support with technical qualification of sales opportunities
- Preparation of standard templates for the relevant documents

6. FLOWCHART:



7. ACTIVITIES

7.1 RFP / EOI / Other Documentation

The opportunity is created by the Account Holder (Sales) and forwarded to PAC for Approval. After approval, a mail notification will be sent to the Presales Head. The Presales Head then tags the concerned Presales team member with the opportunity. Any further job/task related to the opportunity automatically gets intimated to the tagged Presales member, immediate Reporting Authority and the Presales Head via e-Mail and Kwantify.

Inputs	• Any relevant document from client side	**Entry Criteria**	• Kickoff meeting is done.
Outputs	• RFP • EOI • Concept Note, etc	**Exit Criteria**	• Review and Submission to Account Holder
Tailoring	• In case any opportunity is not approved by the PAC, still the Account holder can send the request to the presales Head with prior approval from ICC heads.		

Step	Activity / Task Description	Responsibility
1	Identify and analyze the requirement during kickoff meeting.	Presales Head, Project Manager (BSS), Tagged Presales Member, Other Depts. (if required)
2	Preparation of RFP / EOI with the support of both BSS and NSA members	Presales Member, BSS member and NSA member
3	Review of RFP / EOI	Presales Head
4	Upload / Submission of RFP / EOI	Presales Member

7.2 Lead Creation

The Presales team member search for tenders in the newspaper and Government websites / portals. The relevant advertisements found can be intimated to all the Sales Personnel. They will filter out the required tender and apply it to PAC.

Inputs	• Govt. Website • Newspaper • Tender Info (Paid portal)	**Entry Criteria**	• Searching of tenders of appropriate location by corresponding Presales member
Outputs	• Tender details	**Exit Criteria**	• Submission of tenders
Tailoring	• Additional information of any tender (if required)		

Step	Activity / Task Description	Responsibility
1	Searching of tenders from Newspapers / Website	Management Trainees
2	Reviewing and finalizing of tenders for opportunity conversion	Account Holder (Sales)

7.3 Proposal Preparation

The opportunity is created by the Account Holder (Sales) and forwarded to PAC for Approval. After approval, a mail notification will be sent to the Presales Head. The Presales Head then tags the concerned Presales team member with the opportunity. Any further job/task related to the opportunity automatically gets intimated to the tagged Presales member, immediate Reporting Authority and the Presales Head via e-Mail and Kwantify.

Inputs	• RFP	**Entry Criteria**	• Kickoff meeting is done.
Outputs	• Proposal	**Exit Criteria**	• Review and Submission to Account Holder
Tailoring	• In case any opportunity is not approved by the PAC, still the Account holder can send the request		

	to the presales Head with prior approval from ICC heads.		

Step	Activity / Task Description	Responsibility
1	Identify and analyze the requirement during kickoff meeting.	Presales Head, Project Manager (BSS), Tagged Presales Member, Other Depts. (if required)
2	Preparation of Proposal with the support of both BSS and NSA members	Presales Member, BSS member and NSA member
3	Review of Proposal	Presales Head
4	Upload / Submission of Proposal	Presales Member

7.4 Co-ordination from BSS, Post Sales and Promotionst

During the proposal preparation, Presales team will take the help of BSS team to prepare the proposed solution details on the respective opportunity; Promotions team will help out in framing the presentation and Post Sales will be helping out in clerical & dispatch requirements.

Inputs	• RFP	**Entry Criteria**	• Kickoff meeting is done.
Outputs	• Proposed Solution • Presentation	**Exit Criteria**	• Review and Submission to Account Holder
Tailoring			

Step	Activity / Task Description	Responsibility
1	Preparation of proposed solution part in the proposal	BSS member and Presales member
2	Preparation of Presentation	Promotion team member and Presales member
3	Review of Proposal	Presales Head
4	Upload / Submission of Document	Presales Member
5	Clerical and Dispatch work	Post Sales Member

7.5 Proof of Concept (POC)

The Presales team member will prepare the prototype/demo as per the requirement of the client to represent it in the presentation.

Inputs	• Relevant document from Account Holder	**Entry Criteria**	• Preparation of Demo with the help of BSS team
Outputs	• Prototype preparation	**Exit Criteria**	• Submission of Prototype to Account holder
Tailoring	• Additional information to Account Holder (if required)		
Step	**Activity / Task Description**		**Responsibility**
1	Request for Prototype (POC) by Account Holder		Account Holder
2	Prototype designing with the help of BSS team		Presales member, BSS member
3	Review of the prototype by Presales Head		Presales Member
4	Submission of Prototype to Account Holder		Presales member

8. KEY PERFORMANCE INDICATORS

Pre-sales engineers help potential customers see the value of a particular product or solution. These engineers combine deep technical knowledge with soft-skills to understand the customer's problem, establish a foundation of trust with the customer, resolve their concerns and become their trusted advisor. In most cases, the performance of pre-sales engineers will have a direct impact on the outcome of a deal. Thus, it is important to ensure the pre-sales team is operating efficiently and effectively. While there are many things that could be measured, following key metrics can be used to gauge the effectiveness of a pre-sales team.

8.1 Revenue Influenced per SE

8.2 Time Allocation and Utilization per SE

8.3 Proof of Concept Effectiveness

8.4 Training

8.5 Iteration

8.6 New technology knowledge sharing

Revenue Influenced per SE

Pre-sales teams should track the amount of revenue that a Sales Executive (SE) influences each quarter, each year, and through the entire time they are part of the SE team. This metric can be used to identify those who are consistently influencing revenue and looking to incorporate their best practices back into the wider team.

Applies to: All Presales executives & consultants

Unit : Percentage

Measurement Formula:

(Total revenue converted to work order/total opportunity cost within a time frame) X 100

Time Allocation and Utilization

Tracking time allows for an SE to be accountable for where and how they spend their time. Furthermore, managers can see what the SEs are spending their time on, and if those activities are influencing revenue. As a general rule of thumb, it is expected that the top four or five activities should be customer facing activities. This also gives great insight to those SEs who might be over or under utilized and allows for specific course correction by management.

Applies to: All Presales executives, consultants & MT

Unit : Percentage

Measurement Formula:

(effort given to opportunity in man-hr/total effort given within a timeframe) X 100

Proof of Concept Effectiveness

Doing a proof of concept (PoC) is sometimes necessary as part of the sales process. However, if not managed correctly, doing a PoC can prolong sales cycles and potentially do more damage than good to the account. Tracking the number of PoCs per quarter and the amount of revenue tied to the PoC is critical. Furthermore, what % of PoCs resulted in revenue is just as important. In addition, tracking the amount of time from PoC completion to revenue realization is important to help organizations understand the overall effectiveness of the PoC on the sales process.

Applies to: All Presales executives & consultants

Unit: Percentage

Measurement Formula:

(total number of PoC converted to WO/Total number of PoC Done within a timeframe) X 100

Training

As technologies change and evolve, it is important to provide the SE team with the skills necessary to be successful. How much training do they get, and what kind of training is important to track. Knowing who has had what training, and the last time they had the training helps establish a training plan to ensure a high performance team. In addition, the training should not just be technical training. Soft-skills are such a critical component to the job of an SE, that this type of training should be at least 50% of the training received over the course of the year.

Applies to: All Presales executives, consultants & MT

Unit: Percentage

Measurement Formula: Average %ge of mark obtained in the assessment within a time frame

Iteration

It's important for the SE to get its job done on time, within budget and as per the quality standard. This is achievable if the job is done in one shot. In other words, the less the iteration in work, the more effective is the SE's work.

Applies to: All Presales executives , consultants and MT

Unit: Number

Measurement Formula:

Average number of iteration in any work assigned within a time frame. Less the number more is the effectiveness.

New technology Knowledge Sharing

One major part of the job responsibilities of senior presales consultants is to share knowledge amongst the team members. One of the key result area for the presales consultant and senior presales consultant is how many knowledge sharing session s/he has conducted within a particular time frame.

Applies to: All Presales executives & consultants

Unit: Number

Formula: Number of knowledge sharing session conducted within a particular time frame.