

The Six Habits of Highly Effective Sales Engineers

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Chris White

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If you're a Sales Engineer, *The Six Habits of Sales Engineers* is a must read. It is comprehensive, covering pre-demo discovery, demonstration planning, delivering technical demos, and as Chris calls it the 'demo aftermath.' Yet, it is simple to remember and apply as it is sectioned into Partner, Probe, Prepare, Practice, Perform, and Perfect. Since Chris has spent his career as a Sales Engineer, the book is real world. Chris has lived in the trenches, so he tells it like it is, with relatable stories about working with counterparts, prospects, and customers. The principles in this book will enable any Sales Engineer, new to the field or tenured, to deliver winning demonstrations.

—Brian Geery
Author, *How to Demonstrate Software So People Buy It*

With relatively little content available to help sales engineers perfect their craft, *The Six Habits* is a welcome and much needed addition to the SE toolkit. Chris goes beneath the surface level to examine some of the underlying challenges that place a drag on an SE's effectiveness, and offers actionable tactics to address them.

—Rob Falcone
Author, *Just F*ing Demo!*

Creative engineers, product designers, pioneering scientists and entrepreneurial high-tech mavericks all face a difficult challenge: *How do I get the world to not only grasp my newfangled idea, but embrace it?* When it comes to persuading others to buy in, the mastery and brilliance that brought the idea into being is the very thing that gets in the way. With just the right mix of art and science, Chris White brings a rare blend of natural talents and boatloads of experience to reverse engineer, reveal, and playfully communicate the inner works of a mysterious process that stumps the best of us.

—Anthony Spadafore

Founder, Pathfinders | Career Design Consulting

Every sales engineer should read this book! These behaviors don't come naturally to the technically minded, but Chris does a great job of laying out the essentials. I guarantee you will close more deals if you make this required reading for your technical team.

**—Craig A.
Senior Account Executive
Fortune 100 Software Company**

As a management consultant, I am often subjected to demos by product companies. An over-keen 'techie' tries to show us all the bells and whistles of the product he/she is proud of. The looks of boredom and bemusement on the faces of the attendees do not deter the demonstrator from the task. In fact, there seems to be no communication whatsoever between demonstrator and demonstratee! By the end the poor product salesman has no idea if the attendees are more likely to buy, because no one asked them what questions they wanted to have answered in the first place.

I had the privilege to see Chris' first workshop presenting his six principles. I just wished all the sales engineers (SE) I had been subjected to in the past had been introduced to these simple and practical principles. I recently attended a demo and was surprised when the SE asked me beforehand what I wanted to get out of the demo. During the demo he proceeded to meet my stated needs in a simple but engaging manner. By the end the salesman felt confident a sale was highly likely. When I congratulated the SE, he told me he had learned from the best – Chris White!

**Chris Collins
Chairman, i-Realise Ltd**

The Six Habits is fantastic. I just wish this was available to me at age 24 when I started in this industry.

—Jim D.
Director Solution Architect
Fortune 100 Software Company

About the Author

Chris White, is a recognized expert in software technical presales. He has given and observed literally hundreds, if not thousands of enterprise software demonstrations during a career that has spanned nearly three decades. He is known for his ability to deliver insightful, engaging, and highly compelling sales demos. His style and approach are both appreciated by customers and esteemed by colleagues.

The Six Habits emerged as a result of a need to develop training for a team of presales consultants that he was responsible for years ago. Through personal trial and error, observing some of the best sales engineers in the business, and experiencing both victory and defeat, Chris packaged his methods and approach into a framework of teachable, learnable, repeatable best practices, tips and techniques. Now, after years of presenting, teaching, curating and refining his message, and coaching countless others to achieve extraordinary success, he unveils this wealth of knowledge to the industry in the form of *The Six Habits of Highly Effective Sales Engineers*.

Dedication

This book is dedicated to my father, Bernard F. White, Jr, who passed on 7 December 2017, Pearl Harbor Day.

“Work hard and play hard, Chris!”

Thanks Dad. I think you’d be proud.



To my four great kids, Bradley, Greg, Anna, and Holly, and my infinitely inquisitive stepdaughter Alexandra.

I hope this inspires all of you to think big and reach for the stars.



To my wife Chawn, who has supported me from day one, through long days, late nights and grumpy mornings.

Thanks for everything dear. You’re the best. I love you.

—Chris White

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Foreword

Simply put, the Six Habits work. I have a unique perspective as I first had the opportunity to observe and experience them in action as a customer, and I have since learned and implemented them as a sales engineer.

In my former role, as VP of Software Engineering at a data and analytics company, I oversaw a strategic IT transformation project. I often dreaded interaction with software vendors – another tool, another vendor, another “best of breed, save the world with my solution” pitch. I quite literally avoided my phone in fear of being “vendorized”.

Immediately Chris was different. He came totally prepared, clearly having done his homework. He asked meaningful questions. We discussed my problems and objectives first, and then how the technology could support it—as opposed to the reverse. He was incredibly effective and efficient with my time and focused on business value and project success, weeding out unnecessary noise. He treated the engagement as a partnership, and together we secured the budget for the project from the CIO, as a team.

The project itself was, in essence, a two-year internal sales engagement that included running dozens of workshops with technology teams across a vast organization. We had to prove the business value of transformation and how the newly implemented process and technology were going to drive business value. The success of the project depended on getting buy in from technical principals from across the company - i.e., getting the technical win. In hindsight, I recognize that it was the implementation and practice of the six habits that, in part, made the project so successful.

About two years ago I decided to make a career change and joined a technology company as a sales engineer. Even though I had been in technology for decades, taught computer courses for years, and ran dozens of workshops, the role of SE was new to me. I was also smart

enough to know that Chris is *The Expert* in sales engineering, and I needed his help. As such, I took the “Six Habits of Effective Sales Engineers” online course during the transition. It dramatically accelerated the learning curve and enabled me to become immediately and highly effective in the role.

What makes The Six Habits so unique is that it is such a complete and comprehensive list of tips, techniques and best practices that has been assembled and packaged in such a tight and digestible manner. Anyone in software sales, whether that’s direct sales, sales management or sales engineering, will benefit from this book. And for those of you considering the move or in transition, you need this book.

Today, I love my role as an SE. I enjoy the interaction of people and technology. I thrive on the opportunity to help customers reach their goals. I keep the Six Habits at the ready and refer to them regularly, especially before large engagements. After all, I don’t want to just be a sales engineer, I want to be a great sales engineer.

—Stephen Brown
Sr. Principal Solutions Architect

Preface

Allow me to begin by sharing a few short stories that eventually led to the creation of the content you're about to read. The first happened shortly after I accepted my first job as a sales engineer (SE) – or “application engineer” (AE) as we were called at the time. I was at a cocktail party when I struck up a conversation with a gentleman whom I had not met before and the conversation, as it is so often inclined to do, turned to work. At one point he asks, “So what do you do for a living?”

Before I share with you my response to this innocent question, let me offer some context. I had been an IT professional for about 15 years before I made the jump to technical presales. I graduated from college in 1991 with a degree in Computer Information Systems (James Madison University in Virginia. Go Dukes!) I got my first job as a software engineer with Freddie Mac, a company at the time that very few people had ever heard of, but now one that most are familiar with for all the wrong reasons.

After three years there, I made the leap to IT consulting and for 10 years, held various consulting positions and roles. I worked numerous engagements as a consultant, but the foundation of my work was architecture and data – enterprise architecture, information architecture, data warehousing, business intelligence, etc. I share this context with you to say that, when I made the leap to technical presales, I was a “technology guy”. In fact, I was an expert in my field. And I took pride in that. My education was in technology, not sales and marketing. My experience was in technical roles. I had never received any formal sales training. Never considered myself a sales person. Never thought I'd be in sales. It was “beneath me”—or so I thought at the time.

Incidentally, you might be asking yourself “Why then did you make the move to technical presales, Chris?” It's a valid question, and one that I will address briefly. I hit a point in my consulting career where I found myself getting bored very quickly with each new consulting

engagement I was assigned to. I'd be assigned to a new project. "Figure things out." Make some recommendations or implement a strategy, and then I'd be ready and eager to move onto a new project. To be honest, I thought there was something wrong with me because most of my colleagues were looking for 2 to 3-year projects to work on. Yet, I was typically looking to get out after 3-6 months.

I went through a professional career coaching program and discovered that there was nothing wrong with me at all; I just had some unique talents, and some very strong tendencies that needed an outlet. I needed a role that would provide for short bursts of engagement with numerous clients and lots of new, interesting, and different problems to solve. Funny enough, technical presales seemed to be a logical fit. I was very good in front of an audience. As a consultant, I had given dozens of technical presentations. The idea of "parachuting" in to see a customer, making a technical pitch, and then "helicoptering" out was very appealing. And I loved the idea of being more in control of my income. This, of course, is the result of being on a commission plan. As a sales engineer, there was significant upside in terms of what I could earn. I was a little intimidated at first by the uncertainty of a commission plan, but also very intrigued.

So back to my first story. I'm at the cocktail party. I had just recently started this new role as an SE, and a gentleman, whom I've not met before, asks me what I do for a living. I respond saying that I have just recently joined a software company, adding that I was an expert in a field called Enterprise Architecture: a field that few people had heard of, much less understood. I'm quite certain I went to unnecessary lengths attempting to explain to him what EA was, and why companies should care, etc. (Come to think of it I'm a bit surprised he didn't excuse himself at that point.). Nonetheless, I concluded my long-winded answer by saying, *"Actually I just moved into a new role. I'm now responsible for giving product demonstrations in the context of presale engagements."* With that his face lit up a little and he said, *"Oh! So, you're in software sales!"*

I think my first thought was *“Did he not hear what I just explained to him about what EA is? Did he not just hear me explain to him that I’m the technical expert? What’s wrong with this guy?”* But in the interest of being cordial, and in pure improv style, I didn’t miss a beat. *“Yes. Exactly. I’m in software sales. Why didn’t I say that!”* I said smiling. Thankfully, for both of us, we were interrupted by a mutual friend and the conversation moved on.

That conversation rattled around in my head the rest of the night. The more I thought about his response, the more I came to realize that he was RIGHT. I WAS in software sales. That IS my primary job now. I just never actually thought about it that way until he said what he said. I never actually thought of myself as “being in sales.” To be sure, I have a different role than that of the stereotypical sales guys. My responsibility is different in the context of a software sales engagement. But at the end of the day, I’m in software sales. From that moment on, until this very day, whenever anyone asks me what I do, the very first words out of my mouth are *“I’m in software sales.”*

• • •

The second story took place only a few months later. My company was hosting a user event in the Washington DC area. We had upwards of about 100+ people in attendance. I was still one of the new guys but beginning to establish myself—at least so I thought. I was invited to participate in the event and was asked to give a 20-30-minute product demonstration during the afternoon session. The software product that I had been hired to support, the software product that I was the self-proclaimed expert on, had been recently acquired by the company and, as such, was new to their existing customer base. Because I was the so-called expert, this was an opportunity to introduce the audience to this new concept, technology, and platform.

To say the very least, I was incredibly excited for the invitation to speak at the event. It was my first opportunity to speak to a large audience since I had joined this new company. And, to be able to do so in front of my peers, and colleagues was an opportunity I relished.

There I am, the day of the event. The room was packed. We had a highly engaged audience. I was ready for my time to shine under the spotlight. My speaking slot finally arrived, and I took the stage. I opened with a few slides and then launched into my demo. I had numerous items that I wanted to demonstrate, but very limited on time. I knew I had to be efficient, and focused. I showed a multitude of screens. I flowed from one view to the next, and man, was I smooth. I think I might have covered more ground in 20 minutes than I typically would in 40. I navigated through that demo like a seasoned expert. The mouse and my words flowed in perfect harmony. I finished right on time, and handed the stage back to the event facilitator, quietly congratulating myself for a rock star performance as I walked off stage.

A few hours later, after we had finished cleaning up from the event, I found myself alone on the elevator with one of the top sales managers. He didn't know me very well yet, and there was a moment of awkward silence – which I decided to break. *“So, what did you think of the event?”* He turned slightly, without really looking at me, and muttered *“It was OK.”* The awkward silence returned, now thicker than before. Determined not to give up, I tried again. *“And what did you think of my brief presentation?”* Thinking to myself, certainly this will get a positive response from him. After all, my session was one of the best all day. I was polished. Nothing crashed. I got through all my material. I finished on time. What’s not to like? Instead, he now turns, looks at me dead on, and says, *“Honestly Chris, I don’t think anyone in there had any idea what you were talking about.”*

He wouldn't have caught me more off guard if he had turned and poured a bucket of cold water on my head. I was flabbergasted to hear that response, completely and totally caught off guard. It's a moment I will never forget. It was in that moment that I realized I had a LOT to learn about technical presales. Being able to move a mouse, and talk at the same time in front of an audience was NOT the recipe for success; that was just the most basic skill needed, the "ticket to enter" if you will, but nowhere near a seat in the front row.

Apparently, I had some things to learn about sales. In fact, I recall one day a few weeks later, and still clearly new to the role, one of my sales counterparts said something to the effect of the "sales process." I remember thinking "*Process? There's a process to sales?*" I thought we just showed up and made a pitch. If they liked it, they bought and if not, they didn't, end of story. I was a very naive engineer when I first got into this role.

The point is, I did have a lot to learn to become an effective presales engineer. And so, the journey to success, through trial and error, began. Over the course of the next five years I gave hundreds of demos. I discovered what worked, and what didn't. I learned from my successes, and I grew through my failures. I became one of the most highly sought-after technical presales resources in the company – in my particular domain, of course. I was regularly invited to present at user conferences, and other industry events. I exceeded quota and made president's club every year I was eligible. I learned from great mentors and great colleagues. At one point along the way, I found myself working longer, and longer hours. I wanted to be successful, but not at the expense of my personal life. So, after discovering what it took to be effective, I then searched and found ways to be more efficient with my time as well. I discovered what it took to be both highly effective, and efficient.

I share all this with you not to brag, quite the contrary. I share this with you because you would have to search far, and wide to find someone who was more confused about what his role was, more blissfully and wrongfully overconfident, and more clueless about what it took to be a highly effective, and successful sales engineer than when I first got into the business. I took some hard lumps. I had to swallow my pride. And I had to figure it out. But after years of trial and error, and experience in the field, and years of watching other sales engineers both succeed and fail, I discovered a formula that worked.

• • •

Fast forward to the year 2011. I was with a new company, a small software company based in London. I had taken over responsibility for a small team of pre- and post-sales consultants. After sitting through a handful of software demos given by the team in my first few weeks, I quickly discovered that they were making a lot of the same mistakes I had made when I first got into the business. They were all VERY good with the software. They were technical experts, like I had been, when I first got into the job. They also didn't really understand the role of technical presales. Again, much like me in the early days. They weren't even aware of some of things they were doing that were potentially detrimental to a sales engagement. They certainly were not aware of some of the specific techniques that they needed to employ to give themselves and their sales counterparts the best opportunity to win the deal, much less their customers the opportunity to make the best decision possible.

Allow me to be very clear. They weren't bad at their jobs. But there was a lot of room for improvement – for their own job satisfaction, for their own benefit, for the benefit of the team and the company, and for the benefit of the customers and prospects they were working with. They just needed some training and coaching, and as such, the content you have in your hands was born.

I discovered that there were a set of patterns that, when followed, predicted technical presales success with incredible accuracy. I will go into more detail on how that success is measured later. What's most important to understand right now is that these patterns that I discovered are teachable, learnable, and applicable, regardless of your background, education, personality and/or speaking style.

Over the years, these patterns evolved into the Six Habits of Highly Effective Sales Engineers. They can be applied by anyone in this business with astonishing results. Read on and get ready to change the way you approach technical presales forever.

Acknowledgement

There are a number of people that have helped me on my journey that I would like to recognize and thank.

I want to thank Anthony Spadafore, creator of Pathfinders, who counseled me years ago and helped me discover my innate, God-given talents. The turning point in my career that launched me into technical presales.

I want to thank Eric Shott and Jim Lee. The two men who hired me into my first presales job. Thank you for the coaching, patience and guidance.

I want to thank all the sales professionals I've had the privilege of working with and for over the years. I'm not going to name names, because I would run out of space, but you know who you are.

I want to thank all the other sales engineers I've had the opportunity to work with and learn from.

I want to thank Mike Levine for giving me the opportunity to share my message on a bigger stage.

I want to thank Drew Clyde and Jack O'Donnell and the Leesburg Junction for hosting my first ever public seminar. That was a turning point for me.

I want to thank John Estrella for the coaching and encouragement. Thanks for the PUSH!

Most of all, I want to thank all the customers I've had the opportunity to present to and work with over the years. You are the reason I love this profession.

#SE_MASTERY



INTRODUCTION

Who is this book for?

This book is for anyone in technical sales, whether that's enterprise software sales, complex platform sales, technology services, etc. If your sales cycles or sales opportunities require the involvement of sales engineers – to give software demonstrations, make technical presentations, design technical solutions, etc. – this book is for you. Whether you *are* a sales engineer, *depend* on sales engineers to close business, or *manage* sales teams that include sales engineers, you will benefit from this book.

How do I define sales engineer? Anyone who is in what the industry commonly refers to as *technical presales* fits into this category. Traditionally, these are the engineers and technical experts within a software company that give product demonstrations in the context of a sales opportunity.

You may or may not think of yourself as a sales engineer. You might not have the title of sales engineer. But if you give software demonstrations for a living or provide technical support to sales professionals in the context of sales opportunities, you fall into this category. Other titles and roles that fit into this category are:

- Solution Architect
- Sales Consultant
- Value Engineer
- Solution Designer
- Sales Evangelist
- Application Engineer

For clarification, I will use the acronym SE when referring to a sales engineer, and any one of the above roles, throughout the book.

This book is especially written for those of you who have recently moved into the role. Once, an attendee of one of my seminars, who was a seasoned SE, told me, “I only wish I had heard this when I started my career at 24.” If you have just entered the profession this book is a gold mine for you. Or maybe you are considering a career in technical presales. If so, the book in your hand will give you great insight into what this role is all about.

This book is also for anyone in software sales. If you sell a technical product – software, services and solutions, and you work with and/or depend on technical resources to close business and generate revenue, this book is for you. It will give you insight into how we (SEs) think and operate. If your team is underperforming, you have in your hands a wealth of information that will drastically improve the way you and your team operate, present, demo and deliver. Incidentally, as you read through the book, you will see that it is written as if I’m speaking to a sales engineer. You will see references to “your sales counterpart” or “sales rep”. That would be you.

This book is also for those of you in sales and SE management. I’ll assume that you and/or your organization have defined your own sales processes, best practices, sales motions, etc. You’ve probably implemented sales training, sales coaching, sales enablement and onboarding. Here’s the thing. SEs are a unique breed. I suspect I’m preaching to the choir with that statement. They require a unique brand of sales training. Yet, there is very little sales training in the

market designed specifically for SEs. The material you have in your hands will do wonders to augment the training and enablement you currently have for your SEs and will help you build cohesion between your sales teams and SEs like you never imagined.

Introducing the Six Habits

Taking a page out of, *“Great Demo!”* by Peter Cohan, I’m going to do the last thing first. That’s right, I’m going to answer the most important question right now. What are The Six Habits of Highly Effective Sales Engineers?

1. Partner – Habit #1 is to partner with your sales counterpart. To think of your relationship with your sales counterpart as a partnership. Sales is a team sport, and you are on the same team. In this section, we will examine the different perspectives each player brings to the table, identify some mistakes to avoid, and offer a process for collaboration.
2. Probe – Habit #2 is to probe into any request for a demonstration. It is the habit of digging into a customers’ objectives, requirements, expectations, etc. We do this by hosting a Technical Discovery Call, which we will discuss at great length. In the section, I will provide specific guidance on how to execute technical discovery, offer a list of questions you can use, and discuss other important clues to be on the lookout for that will shape how and what you demonstrate.
3. Prepare – Habit #3 is to prepare with effectiveness and efficiency in mind. This requires a very keen understanding of the difference between preparing demo content vs. preparing the demo script or story. In this chapter, I will reveal the most common mistakes SEs make and time wasters that interfere with preparing for demos. We’ll walk through a plan for how to stay laser focused.

4. Practice – Habit #4 is the easiest in nature, but too important to leave out. The most consistently successful SE's practice their demos religiously. They understand that technical issues in a demo can delay or crush a deal. Before a demo, they make sure to "click every click." In this section, I will unveil the one thing you don't want after a click and offer specific tips for what to look for when "spot checking" your demos.
5. Perform – Habit #5 is to perform under the spotlight. The most successful SE's understand that a demo is more than a technical presentation, it's a performance. There are very specific things that we need to do, say, and avoid in order to earn the trust of your customers and the respect of your colleagues. In this chapter I will arm you with 20 specific tips and, techniques and best practices that will elevate you to technical presales superstar status.
6. Perfect – Habit #6 is to consistently perfect your trade. It's based on the principle of constant improvement. Top performing SE's consistently seek to learn and improve. They collaborate with their sales counterparts and constantly evaluate their performance.

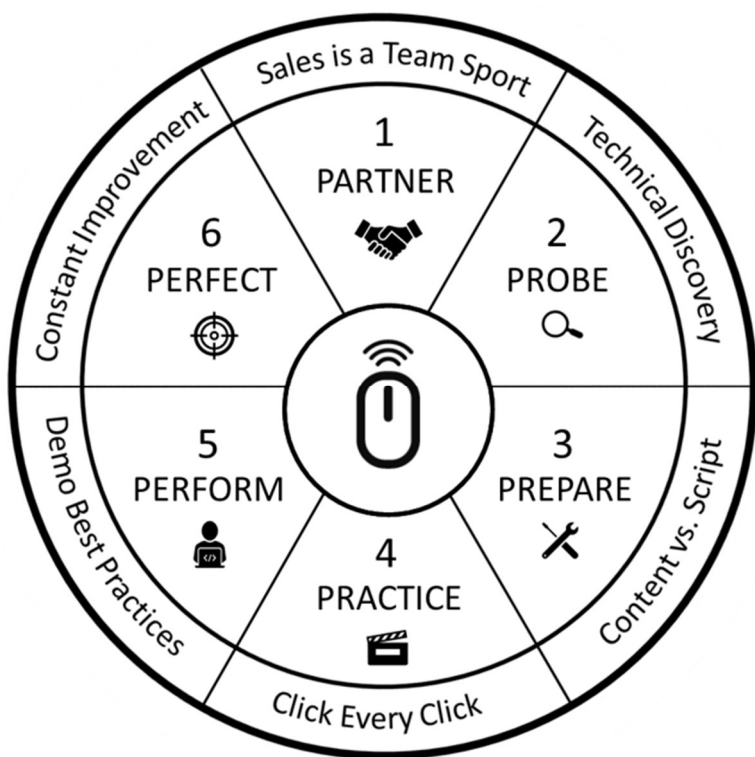


Figure 1. The Six Habits of Highly Effective Sales Engineers

How this book is organized?

The chapters of this book address each one of the habits in detail. In the next chapter, we will look at what it means to partner with our sales counterparts. We will explore what individuals with different roles bring to the table, identify some mistakes to avoid, and offer a process for collaboration. In Chapter 3, we will discuss the Technical Discovery Call at length, and provide specific guidance on how to execute, offer a suggested list of questions, and discuss other important clues to be on the lookout for. Chapter 4 tackles how best to prepare for efficiency and effectiveness. I will reveal the most common mistakes and time wasters that interfere with preparing for demos and give you a plan for how to be laser focused.

In Chapter 5, the shortest chapter in the book, I will elaborate on what I mean by “click every click,” and offer specific tips on what to look for when “spot checking” your demos. I will also unveil the one thing you don’t want after a click. Habit #5 is the longest section of the book and for many of you, may prove to be your favorite. It is divided into two chapters.

In Chapter 6 and 7 we will cover 20 specific tips, techniques and best practices that enable you to perform like a technical presales superstar on stage. Your customers will appreciate you. Your colleagues will respect you. And once you master these skills, your calendar will stay consistently full. In Chapter 8, we close out the discussion on the Six Habits by discussing the importance of consistently, and constantly striving to perfect your demo. It involves collaborating with your sales counterparts after the fact to evaluate the customer meeting and make improvements with every opportunity.

Each of the habits are incredibly powerful, and impactful in and of themselves, but the magic of the Six Habits is the integration, and the interdependency between them because they all relate to, and build upon, one another.

YOU ARE IN SALES

What is the goal of Technical Presales?

I ask this because there seems to be a lot of confusion, and disagreement about what the primary objective of the role really is. In fact, when I speak at an event or teach a class, I often ask this question to level-set with the audience. I regularly get some very interesting answers. “To provide technical support to sales,” some people will say. “To provide technical answers.” “To show and demonstrate complex technical solutions.” All of these are legitimate answers, since they are all part of the role, and then some. But the number one goal—our MAIN objective as sales engineers, what we are ultimately responsible for, and what we will use for the basis of this book—is to get (what I like to refer to as) the TECHNICAL WIN.

What’s the *Technical Win*?

The technical win is to convince the prospect that your solution will meet their needs, solve their problems, and help them achieve their objectives. (By solution, I mean software, platform, tools, etc.) What does technical presales not entail? Your job as a technical presales engineer is not to teach your prospects how to use our software. It

is not training. It is not to solve all of a prospects' problems. It is not your job, or responsibility to show them "everything about everything" when it comes to the product you are selling. It is simply to show them – no, CONVINCE them – that your software, solutions, and company will meet their requirements, solve their problems, and enable them to achieve their desired outcomes.

Many of us in this role come from a technical background. Many of us come from a problem-solving role whether we were in customer success, post-sales consulting, training, or expert users of the software. We are used to playing the role of technical expert. We are used to solving problems. Here's the thing, however, we are no longer in the problem-solving business; we are in the *convincing* business. This requires different muscles, different skills, and different approaches.

How does this differ from the role of the salesperson that we are paired up with? If we are responsible for the technical win, what is their job? What is their role? They are ultimately responsible for revenue. That's it. Very simply put, they are responsible for revenue and you are responsible for the technical win. For them, this includes things like managing the account, negotiating price, working out terms, closing the deal, etc. They are essentially responsible for the overarching sales process, which includes prospecting, by the way, something very few people like. They are also responsible for the account, the opportunity, and the customer relationship, the last of which we play a large role in, of course. But, at the end of the day, we own the technical win. Does that include answering technical questions? Yes, of course. Does that include making technical presentations and, demonstrations, of course. However, success in this role is ultimately measured by one thing: getting the customer to say YES.

INSIGHT: *In the late stages of completing this book, I had the opportunity to discuss this term "the technical win" with John Care, Author of Mastering Technical Sales: The Sales Engineer's Handbook. He's one of the foremost experts in this space. He*

shared with me that he dislikes the term as it's "hard to measure and can encourage an SE to disconnect before the business win happens". He went on to say that "no one gets paid on the technical win". He argues that effective SEs hold themselves accountable for the business win as well. It occurred to me that even though I use the term "technical win", I'm in complete agreement with him. By no means am I suggesting that we, as sales engineers, should be focused solely on the technology. Quite the contrary, as you will see throughout the book, I'm emphatic about aligning whatever technology you represent with the business needs and objectives of your prospects and customers. A key aspect of the "technical win", in fact, an addendum to the definition above, is "to convince your prospects that the business value of the solution outweighs or justifies the investment".

I use the term 'technical win' throughout this book. I do so because so many of the SEs I have observed seem to forget that we are not in this role simply to inform and educate. Our job – as we will discuss in great detail – is to convince. Please understand that when I use this term – technical win – I'm referring to the responsibility to both convince the audience of the technical superiority of the solution and establish the business value of the investment.

What are our goals personally?

So, if the goal of presales is to get the *technical win*, what is our goal? What I mean is, what are our personal goals and objectives? What do we individually hope to accomplish in the role?

I can't speak for everyone in this role, of course, nor do I want to put words in your mouth but allow me to share with you what I've observed and experienced over the years.

Number one, and I think, unanimously, we want to maximize our income. Our pay is usually based on the number of deals we win. So, we, of course want to close as many deals as possible. We want our

presentations/demonstrations to be a positive experience – for ourselves, our colleagues and our audiences. We want the audience to understand what it is they are seeing. We want them to be impressed and of course like what they see. We want them walking away convinced that our people, products, and solutions would solve their problems and meet their needs. We want them walking away ready to buy our software.

We also want to maximize our time and minimize unnecessary late nights and long hours. We want to avoid “sprints to the finish line” preparing for demos and customer meetings. Thus, we want ample time to prepare effectively for customer meetings and presentations.

INSIGHT: *I personally didn't want to have to work late nights, on a consistent basis, in order to succeed, but there was a stretch of time that I did – a long stretch of time. UNTIL I figured out how to be both efficient and effective with my time and avoid working on demo content that I'd never have time to show anyways. We will cover this a great deal in Chapter 4.*

Finally, we never want to feel like we're wasting our time, whether that's preparing for or traveling to a demo that's poorly qualified or seems unwinnable. We don't want to feel as though we're being asked to demonstrate something that's beyond our capabilities, or those of the software or platform.

This sounds reasonable...

This sounds reasonable enough, right? To achieve the technical win, and to meet our own objectives? This doesn't sound like an impossible task... Right?

Think again. This is not an easy job. We are put, at times, in impossible situations. We can find ourselves caught between sales teams stressed to close business, looking for you to work magic with

the software. Product teams juggling hundreds of requirements, expecting you to demonstrate the software with precision. Prospects and customers, looking to you for answers and holding you accountable when things don't work – be it right or wrong. We are on the front line with prospects and customers, and often so much is riding on the software demonstrations we give – for us, our colleagues and our customers.

But when we succeed, we're superheroes. When we give an "out of the park" demo (that's a baseball reference for home run, in case any of you aren't baseball fans), it's exhilarating. In fact, I'm quite convinced that that's why those of us in this profession stay. It's the thrill of the hunt, so to speak. The thrill of being presented with a challenging set of requirements to address and delivering the ideal demo. But if there's anything I've learned in this business, there are very few "instruction manuals" on how to be a successful sales engineer.

So how do we do this? How do we achieve the technical win and meet our own objectives? And how do we do it on a consistent, reliable, and predictable basis? The book you're holding in your hands, of course, is going to walk step by step through the six habits just introduced. But before we get into that, let's just answer this question notionally. How do we achieve the technical win?

It begins by establishing trust and building confidence with our audience – that is, the prospects and/or customers that we are working with. As a rule of thumb, we are going to be given the benefit of the doubt in most cases, because we're the "technical expert," and not the "sales guy." But at the same time, we must earn it. We must earn their trust and confidence.

We need to build relationships and develop rapport. We do this by listening to, and understanding their objectives, goals, requirements, etc. We offer insights and suggestions. We demonstrate our knowledge, and competencies around their areas of concern and interest through presenting the product and

solution. More specifically, by demonstrating the capabilities that explicitly address their need and solve their problems. We show our audiences how they can achieve success using our solutions by giving them a vision of hope for the future. We ultimately get the technical win by getting our audience excited by generating enthusiasm for what's possible.

Seems straight forward enough, right? What's the problem? We know the goal of technical presales – to get the technical win. We know what we need to do to get there. What are the obstacles that get in the way of our success? Why aren't we able to achieve this every time?

What gets in the way?

There are numerous things that stand in the way of our success and throw us off course. Let's review a few of those things. Probably the biggest obstacle to our success is finding ourselves in a customer situation we are ill-prepared for. The best example of this is when we've been asked, or even forced to do a demo, or presentation that we are unprepared to give. But why and/or how does that happen?

Sometimes our sales counterparts don't properly qualify for an opportunity or a customer request. Maybe we simply aren't given enough time to prepare or maybe a given solution is oversold by marketing or sales. Maybe we misinterpreted the expectations and requirements or didn't ask the right questions to begin with. Sometimes the prospect misrepresents their needs, requirements and/or expectations. Whatever the case, if we find ourselves unprepared in any given situation, it indicates that there was a form of miscommunication somewhere, possibly between sales rep, sales engineer and/or prospect.

Regardless of where that disconnect occurs, all these issues are addressable, and avoidable. We will address all these situations so that you will be armed with the skills necessary to avoid being

caught off guard or ill-prepared. And in the unlikely event that you are, how to handle it with grace and confidence, and keep a deal alive.

What are some of the other reasons we fail to achieve our objective? What are some of the other obstacles that get in the way of a successful demonstration and hurt our deals? Sometimes new, unexpected people appear – either in the context of a given meeting or in the context of the overall sales engagement. They introduce new ideas, new priorities, needs, etc. And as a result, it derails or delays the deal and/or throws the sales presentation or demo into a tailspin. Sometimes we come face to face with antagonists who seem to care only about making us and our solutions look dumb. Sometimes we have technical difficulties during the context of a sales demonstration, and when that happens – which is inevitable, by the way – we need to know how to roll with the punches. Sometimes the demo just misses the mark and the prospect isn't impressed. It happens. It's part of being in technical presales, but again, we need to know how to handle those situations as well. Sometimes there's a personality clash and we just don't click with the audience. Again, we need to recognize those situations and be prepared.

At the end of the day there are numerous things that can and will go wrong in the context of a sales opportunity, and more specifically a software demonstration. Things that may seem to be outside of our control. But the reality is we may have far more influence and control over those things than it might appear on the surface. By learning and adopting these six habits and the related skills, you'll be equipped to avoid many of those scenarios and manage every situation.

What mistakes do we make?

What is it that we do that gets in the way of our own success? We've cited the obstacles that get in the way. But sometimes we are our own worst enemy. The good news is that these are the

easiest issues to address – because they are well within our control. These are the biggest mistakes I've seen made in this profession. (And frankly, the mistakes I've made and had to learn from over the years).

1. First and foremost, we don't understand our role. We think of ourselves as engineers, as technologists. We don't think of ourselves as sales.
2. We focus on the wrong things. We focus on ourselves, our products, our features, our story, etc. etc. etc. (Are you seeing a trend here? It's the "me, me, me" syndrome!) We need to focus first on our prospects and customers – their objectives, their needs, their requirements. Then position our solutions accordingly.
3. We also focus too much on the *thing* and not the *story*, i.e., the product and not the message.
4. We confuse presales for training. We come by this honestly. Many of us come from a consulting or technical support background. We are used to providing training on software tools. But a sales demonstration is NOT training. The goal is NOT to teach the audience how to use the tool. It's to get them excited. It's to show them what's possible. It's to get them to say yes.
5. We confuse technical presales with consulting. We make the mistake of trying to solve a prospects' problems as if we've already been hired.
6. We dive too deeply into their problems – especially in the context of preparing for a product demonstration. We forget to leave full problem solving to the post-sales consultants.
7. We treat every customer or opportunity the same. We approach every demo the same. In technical presales one size

does not fit all. Every customer is different. Every situation is unique. What makes one prospect say YES may be very different from what will make another say yes.

8. We take too long to prepare for demos. We get carried away and build more than is required. We insist on showing customers unnecessary content and capabilities because they're cool or because we built them. It delays deals. Derails conversations. And alienates our sales counterparts.
9. We overlook the little things – such as practice. We forget to double check that everything is working. As a result, we have a crash or failure in front of a customer – usually at the worst possible time. Something that could easily have been avoided had we just spot checked our demo.
10. We've not been taught the skills that turn a technical demonstration into a winning sales demonstration. In fact, some of us don't recognize they exist when we enter this field. (I didn't.)
11. We don't learn from our mistakes, or at least learn from what went wrong, from one demo to the next. We accept weaknesses and limitations in our software without finding a work-around.

That probably seems like a long list of issues, challenges, and obstacles to deal with. We are going to deal with all of them. It begins with changing our mindset.

You Are in Sales!

Yes, my friends, if you are a sales engineer, you are in sales. As we discussed a moment ago, you may have a different title – solution architect, sales consultant, value engineer, etc. But regardless of your title, if you are responsible for technical presales presentations and demonstrations, you are in sales.

Why is this so important? Why do I even take the time to mention this? Because so many of the people I have worked with over the years – in fact, so many people I’ve seen in this role – do not think of themselves as sales. Nothing, however, could be further from the truth. And worse, nothing could be more detrimental to your success. If you have a quota, you are in sales. If your job is to convince people to select your software over another, you are in sales.

I just have a hard time with that word Chris – “sales”

I know you do. I did too! For many of us, the idea that we are in sales simply goes against our constitutional compass. We’re engineers at heart. We’re engineers in the way we think. Like I said in my opening, sales is almost offensive. But allow me to stress, I’m not saying you’re a used car salesman, who does whatever and says whatever to get the sale. What I’m saying is in order for us to truly succeed in this role, we need to change our mindset. We need to clearly recognize that we are no longer in the teaching/consulting/informing business. We are in the *convincing* business.

We have a different role from that of our sales counterparts, and we’ll talk about that a great deal in this book. But if you are in this role, or you are considering a job in the field, please know that yes, you are in sales. Just as I discovered, almost accidentally at a cocktail party, that was my job. If you don’t come to grips with this fact, adopting the six habits is like building a house on a shaky foundation.

Sales is a Courtship

Let’s go a step further. What exactly does it mean to be in sales? Sales is a courtship. We need to interact with prospects and customers the same way we would if we were courting someone –

because that's EXACTLY what we are doing! If you're married or in a long-term relationship, I want you to think back to your first couple of dates. Did you act then the way you do now? Of course not! And how did you act differently?

Here are some guidelines:

1. We ALWAYS put our best foot forward – with respect to ourselves, our solutions, and our company.
2. We ALWAYS act on our best behavior. We use our best manners.
3. We ALWAYS represent the company, our software, and our colleagues in the highest regard.
4. We NEVER air our dirty laundry – whether about our company, the product, our colleagues, etc.

You might be saying to yourself, why would you even mention these things? They seem so obvious. So basic. My answer: you would not believe how many times I've attended a demonstration in which the sales engineer was grumpy about something – the company, his sales counterparts, the product, etc. and made his/her disapproval known openly and often. I've seen sales engineers get belligerent with prospects. I've seen them get defensive, rude, arrogant, insulted by questions, etc. etc. The list frankly goes on and on. We are in sales. We are guests in someone else's place of business. And we need to act accordingly – for our own benefit! Remember, our goal is to get the Technical Win.