Technical Sales Support Request Form (SE Engagement)

Document ID: SAL-SE-2025.01
Version: 1.0
Effective Date: 2025-11-01
Department: Sales, Solutions Engineering

1. Request Details (To be completed by AE)

Field	**Input**
Account Name	
Opportunity ID (CRM)	
Sales Stage	[X]% (Must be 20% or higher)
Required Date / Deadline	
Solutions Engineer (SE) Requested	[Name or 'Any Available']

2. Engagement Type

Type	**Description**
[ ] **Technical Deep-Dive Call**	Required for detailed API/integration questions. (Stage 2/3)
[ ] **Security/Compliance Review**	Required for IT/Legal Vetting (Stage 3+)
[ ] **Proof of Value (POV) Scoping**	Required for defining success metrics for a pilot.
[ ] **Custom Demo Environment Prep**	Required if the standard demo is insufficient.

3. Client & Technical Context (Mandatory Information)

- **What is the client trying to automate (The Use Case)?**

    - [E.g., Automating invoice fraud detection in the Finance department.]
- **What are the client's current data systems/architecture?**
    - [E.g., Data resides in AWS S3, uses Snowflake for warehousing, requires Python API integration.]
- **What is the specific technical hurdle/question the SE must address?**
    - [E.g., "Can your model run on-premise, air-gapped from the cloud?" or "What is the latency guarantee for real-time risk scoring?"]

4. SE Assignment and Acceptance

Assigned SE: [SE Name]
Date Accepted: [Date]
SE Comments: [Confirmation of feasibility and required preparation time.]