Sales Engineering Strategic Plan

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Overview of Strategic Initiatives

The overarching mission of the sales engineering team is to grow revenue for the company. Growing revenue requires scaling the sales engineering team to support a greater number of opportunities and at the same time **improving the win rate**.

Winning deals depends upon a number of factors, however the most important factor stems from the sales engineer being able to convince the customer that **ThreatConnect offers compelling business value**.

In order for sales engineers to understand how to do that, they must be trained effectively. The structure of the team, how it operates, how it measures performance, all must support the overall objective of empowering all SEs to focus on business value in every customer engagement.

The pyramid shows the supporting relationships between these **strategic initiatives** as described above.

Sales Engineering Strategy to Grow Revenue

ThreatConnect

Unique Business Value

Customers must be convinced our products offer compelling unique business value (UBV)

Technical Sales Excellence Development

Sales Engineers must be experts in highlighting/delivering that business value in pre-sales engagements

Team Structure & Operational Model

The team structure and operational model empowers the SE team to excel and measures their success in delivering UBV to grow sales

Each strategic initiative requires a number of activities. Those activities are summarized in the table below with greater detail of the activities in the sections that follow.

Unique Business Value & Customer Experience	Technical Sales Excellence Training	Team Structure & Operational Model
Convince customers TC offers compelling unique business value	**Technical staff must be prepared to deliver that business value**	**Establish the right team structure, support mechanisms, automation**
--- Focus SE attention on identifying the Unique Business Value (UBV) in each opportunity from learned customer experiences and pain points --- Redefine the SE 'PoC' engagement as Proof of Value (PoV) where we focus on presenting value; offer alternate paths for immature opportunities --- Take ownership of platform demos and align to UBV in TI, Vulnerability, SecOps, IR; get consulting from 3rd parties --- Develop, produce, & innovate UBVs: collaborate with CS, PM, partners. Output via demonstrations, webinars, blogs & whitepapers	--- Develop ThreatConnect Foundational Sales Engineering content in LMS for onboarding & continuous training --- Establish ownership of UBV (Solution Architects) within security domains: SecOps, IR, Risk, VulnMgmt, etc. and train and develop methods to train SEs --- Develop mock PoV/UBV training for new hires and an SE mentoring program --- Sharpen value/differentiation messaging with product marketing and train on how to lay traps against competitor; presentation skills training	--- Hire in and structure team to support security SME, & establish JSE, SSE, PSE, SA ranks --- Align PM/Engineering leadership for early involvement, bi-directional influence --- Automate POV process with Salesforce opps, produce metrics tracking POV progress, trends, PKIs --- Implement SE Technical Knowledge management and RFP/RFI systems to improve efficacy of responses --- Improve/refine PoV engagement process: standardize execution, artifacts; train teams on sales process

The leftmost labels for the rows above are: **Strategic goal** (first data row) and **How to Achieve Strategic goal** (second data row).

Sales Engineering Strategic Initiatives & Activities to Support Revenue Growth

Business Value & Customer Experience Initiative

Strategic Goal: Customers must be convinced we offer compelling business value during the pre-sales engagement

How do we achieve that?

Identify & Apply Unique Business Value (UBV) in each opportunity

Every engagement with the customer must begin with identifying the business value that ThreatConnect offers. There is no reason to continue a technical engagement unless that can be defined. Sales engineers will be trained on hunting for and identifying **which UBV storyline applies to the customer** prior to any discussion about a PoV engagement. This provides an opportunity to move from feature to feature comparison and winning or losing by number of checkmarks.

Redefine the customer engagement as Proof of Value (PoV)

We will end the use of the term "PoC" and "evaluation" at ThreatConnect and reduce SE involvement in engagements where customers ask for access to just kick the tires.   Instead, SEs will prove business value in engagements (PoVs) where **both the sales rep and SE work to identify the business value** ThreatConnect offers. Alternative ways for customers to gain knowledge of the platform and learn on their own prior to needing pre-sales SE support will be developed.

Develop product demonstrations that align with core security segments and customer needs

We've failed to try and demonstrate ThreatConnect as the one-stop shop product that does everything. It causes too much confusion. Instead, going forward, we are going to develop focused threat intel analysis, IR, SecOps, Vulnerability mgmt, risk, etc. demo flows based on the UBVs developed. SAs will lead the charge to develop them and related collateral.

Develop business value storylines and communicate during engagements, in webinars, blogs & whitepapers

Solution Architects will own producing a standard set of UBV storylines based upon demonstrated business value to customers from previous engagements or existing customers, PM/Eng interaction, and innovative solution building in the lab and collaborating with SEs on opportunities. Exceptions will be reviewed and considered for adoption if proven useful.

Technical Sales Excellence Training

Strategic Goal: Technical sales staff must be trained and prepared to deliver that business value during the pre-sales engagement

How do we achieve that?

Develop ThreatConnect Foundational Sales Engineering Onboarding and Continuous Training Program

Current onboarding must be significantly enhanced to not only include the broad number of technical features and capability sets, but also a substantial number of integrations and subject matter focus areas in threat intel analysis, incident response, security operations, vulnerability management, and cyber security risk management. Sales Engineers must complete certification training paths to ensure they have covered all technical materials in onboarding, via LMS, and any other training materials including integrations, OVA implementation, presentation content, sales & PoV process, differentiation messaging, etc.

Channel partners, MSSP partners, OEM partners are in need of the same materials and program to better understand how to sell ThreatConnect.

Will need support to author the content within LMS.

Business Value, Presentation & Competitive Differentiation messaging

Sales engineers must understand how to identify the business value of ThreatConnect during PoVs. That can be a combination of listening to what the customer is asking for and being prompt in demonstrating value

back to the customer OR by referencing what current customers are doing to achieve value. Currently there is no mechanism for sales to learn about what existing customers are doing.

Sales Engineers must understand and be proficient at delivering product messaging in the form of presentations during the pres-sales engagement. They must also be proficient in laying landmines so that competitors fall into traps.

Sales Engineering Mentoring program

Senior SEs and Solution Architects can mentor new SEs on their first and/or second PoVs during the first quarter of hire after they've passed SE certification. An opportunity compensation model specifically for SE mentoring engagements will be determined. Develop Mock PoV/UBV training for new hires as part of that mentoring effort.

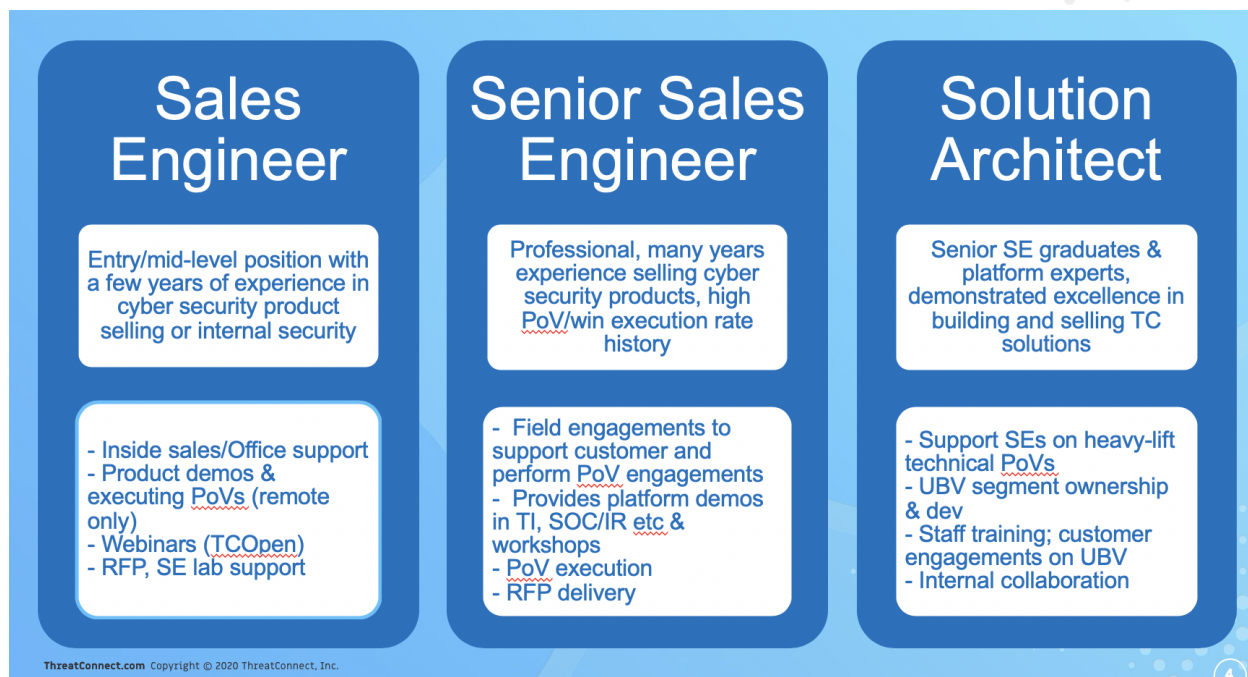# Sales Engineering Team Structure & Operational Model

Strategic Goal: Establish the right structure for the sales engineering team, support framework, including systems to enable self-service and automation

How do we achieve that?

Scale and specialize SE team to support growth into anticipated market segments

Consideration must be given to how we currently attempt to make all SEs senior upon hiring and assume they can learn all security segments: threat intel analysis, incident response, security operations, vulnerability management, and cyber security risk management, then expect them to learn all of the supporting infrastructure technologies, programming languages, networking required for on-premise engagements.

We need to shift toward establishing tiered ranks (Jr. SE, Sr. SE, Solution Architect) so expectations can be managed in regards toward responsibilities and customer engagements. This will offer a balance on salaries as well as provide promotion paths for career development.

Sales Engineer

Entry/mid-level position with a few years of experience in cyber security product selling or internal security

- Inside sales/Office support
- Product demos & executing PoVs (remote only)
- Webinars (TCOpen)
- RFP, SE lab support

Senior Sales Engineer

Professional, many years experience selling cyber security products, high PoV/win execution rate history

- Field engagements to support customer and perform PoV engagements
- Provides platform demos in TI, SOC/IR etc & workshops
- PoV execution
- RFP delivery

Solution Architect

Senior SE graduates & platform experts, demonstrated excellence in building and selling TC solutions

- Support SEs on heavy-lift technical PoVs
- UBV segment ownership & dev
- Staff training; customer engagements on UBV
- Internal collaboration

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Align with PM/Engineering for early involvement on product

Sales Engineering leadership will engage early on in product development and provide feedback. They will also get early access to the product and provide input on features, functionality and help test. This interaction will help provide early input to product mgmt, begin to set expectations for what is coming on the sales side, and potentially reduce quality issues upon release.

Automate POV process with Salesforce opps, produce metrics tracking POV progress, trends, PKIs

POV setup and performance tracking must all reside within and be automated as much as possible within Salesforce. Too many email chains and provision/de-provisioning issues consume wasted time. Salesforce has to be fixed ASAP with the necessary data fields to: PPOV execution & timelines, POVwin/$ rate, #POVs, POV Activity with Pendo, POC success criteria logging, POV provisioning details.

Implement TC Technical Knowledge management and RFP/RFI system

Sales engineers require a knowledge management system that can be used for self-service learning, common issue resolution and support the completion of RFI/RFPs to reduce the time lost hunting for information that previous sales engineers researched and completed.