

Technical sales: Solidify the relationship with your sales counterpart.

Three simple steps to ensure you have a healthy relationship for success.

STEP 1

Account execs and sales engineers are fundamentally wired differently. When working together, understand and remember this.

	ACCOUNT EXECUTIVE	SALES ENGINEER
Typical background	Business/non-technical	Technical/engineering
How do they tend to think?	Think like others - think like the tribe. This is known as "Tribal"	Think independently - different than the tribe. This is known as "Maestro"
Introverted/Extroverted	Extroverted	Mix
Motivated to be?	Life of the party, center of attention	Recognized for their expertise
When ask a question...	"Round up", err on the side of favorable	Answer with precision
Initial perception of things/others...	Accepting, trusting, benefit of the doubt	Sceptical
Fear most in the context of a deal...	Losing the deal	Losing credibility
Most hate hearing the other say...	Things that kill/slow the deal	Things that sound untrue, exaggerations
What do they think to themselves?	They have no idea how hard my job is	They have no idea how hard my job is

STEP 2

In order to develop sound working relationships, be aware of mindset, guardrails and accountability.

MINDSET



- We need to get our mindset straight. Sales is a team sport
- We are in this together
- Neither one of you is always going to be right or wrong
- Equal partnership requires active listening
- Don't expect perfection
- Prioritize the customer over your personal agenda

GUARDRAILS



- Clarify roles and responsibilities
- Know your lane and understand the other
- Stay in your lane, but be prepared to step out when necessary
- Make a concerted effort to understand each other's value
- Establish a process and follow it
- Present a united front

ACCOUNTABILITY



- Set expectations and hold each other accountable
- Be willing to be held accountable
- Don't take feedback personally
- Don't make it personal
- Show loyalty to the company, product and one another
- Have the courage to have difficult conversations and know how to do so

“A good relationship between the account executive and technical sales is imperative to meeting or exceeding quota.”

- VP of Sales

STEP
3

Learn to have difficult conversations by being conscious of expectations, observations and interpretations.



EXPECTATIONS

Expectations of one another should be mutually understood. If necessary write it down. Begin the conversation by stating or restating what your expectations were.

“This is what I expected. Were my expectations flawed?”



OBSERVATIONS

Then state what you observed. Remember, observations can be subjective. Make sure you make room to understand before attempting to be understood.

“This is what I observed. Did you see it differently?”



INTERPRETATIONS

Interpretations are conclusions that we are inclined to arrive at. Remember, this is the danger zone. This is where many problems stem from. State how you might interpret what you've observed, but would like to give the other person the benefit of the doubt.

“This is how I might interpret that. But how should I interpret it?”

Winning relationships requires understanding one another, being mindful of each other's roles and having difficult conversations. Make sure you play your part.



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