PRESALES-LED GROWTH
8 TECHNOLOGIES TO DRIVE RESULTS

NANCY NARDIN
SMART SELLING TOOLS

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PRESALES
OVERVIEW

In the eleven years that Smart Selling Tools has tracked the SalesTech space we've seen hundreds of solutions aimed at various roles within the Sales organization: Sales Development Reps (SDRs), Inside Sales Reps (ISRs), Account Executives (AEs), Field Reps, Sales Enablement, Sales Operations, and Sales Management. It might seem that pretty much covers the gamut. "Pretty much" is the definitive qualifier.

Indeed, the market has overlooked a key constituency for far too long, the PreSales organization. PreSales professionals play an important role interpreting customer needs, educating the customer on product solutions, and proving technical compatibility, all while freeing salespeople to develop and close more opportunities.

According to James Kaikis of the PreSales Collective, "PreSales is the term for experts who partner with your sales professionals to drive deals forward, typically showcasing the value and power of your product or platform."[1]

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[1] https://about.crunchbase.com/blog/presales-the-secret-weapon-in-customer-experience/

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Sales Development	Inside Sales	Account Reps	Filed Reps

PreSales

Sales Enablement

Sales Operations
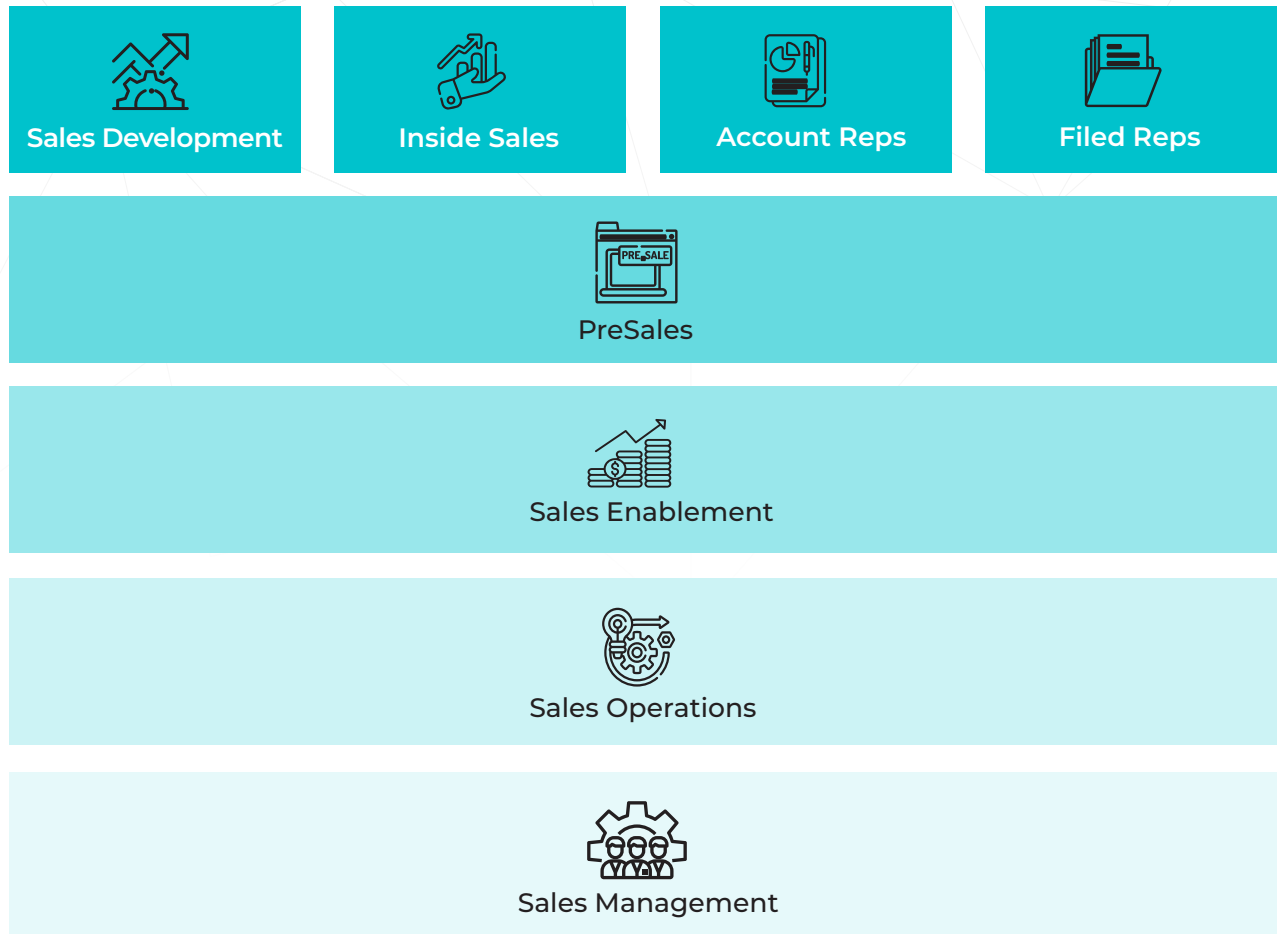
Sales Management

Typical Sales Organizational Structure. Source: Smart Selling Tools, Inc

Typical sales organizations consist of the sellers themselves, sales management, and sales operations. Modern sales organizations that sell technical products may now include Sales Enablement and PreSales as unique organizations with their own charter and personnel. PreSales professionals could be depicted at the top layer with sellers, however, because PreSales representatives can support all stages of the sale, it's better represented as cross-functional.

1

WHAT'S IN
A NAME?

PreSales professionals go by many different names: Sales Engineer, Solutions Engineer, Solutions Consultant, PreSales Consultant, PreSales Engineer, Technical Sales Consultant, and Solutions Engineer are only a few example titles. Regardless of title, they often go by an abbreviation of SE which is short for Sales Engineer. For the remainder of this report, we shall refer to those in PreSales as Sales Engineers or SEs.

In general, Sales Engineers team up with salespeople and are responsible for technical product knowledge, communicating complicated information both externally and internally, presenting product demos, and making suggestions to increase confidence and improve the potential outcome for each prospect.

Technical Sales Engineer

Principal Sales Engineer

Presales Engineer

Sales Support Engineer

Industrial Sales Engineer

Network Sales Engineer

Sr. Sales Engineer

Sales Engineer

Solution Sales Engineer

Solutions Consultant

Sales Engineering Manager

System Sales Engineer

Presales Solution Architech

Presales Consultant

Sales Application Engineer

Technical Presales

Word Cloud based on the occurrence of currently held job titles on LinkedIn

Despite the prefix "Pre" in "PreSales", Sales Engineers usually get involved AFTER the prospect is already engaged with the Account Executive. The term PreSales comes from the requirement that the selling organization must demonstrate technical capability BEFORE getting the final signature. It does not mean it comes before Sales gets involved.

2

THE SALES
ENGINEER

Sales Engineers are employed at companies that sell technology-based products of varying complexity and breadth of use. Communicating specific technical/functional features and benefits of the product and answering challenging questions of how the product fits a customers' specific needs requires a set of knowledge and skills that most salespeople do not have or want to acquire. SEs maintain the deeper technical and functional knowledge for their products. They are aware of the capabilities of competitive products and how to position against them. They understand the trends and related technologies in their markets and that their customers have.

The best SEs combine this knowledge with the diagnosis and problem solving skills of a consultant, the demonstration and presenting skills of a public speaker, and the situational awareness skills of their counterparts in sales.

According to Harvard Business Review, "companies with strong presales capabilities consistently achieve win rates of 40–50% in new business and 80–90% in renewal business—well above average rates."[2]

These statistics reflect the important role SEs play. Their knowledge and collaborative approach build trust with prospects in a way that is arguably less achievable by salespeople whose motivations are perceived to be more driven by self-interest. In addition to the advisor-like role, SEs often function as internal intermediaries, making sure each department is aware of the moving parts of a sale and what's required to win the deal from a technical perspective.

Despite this, Sales Engineers are often the unsung heroes of sales organizations. McKinsey reports that, despite the potential of yielding a five-point improvement in conversion rates, a 6–13% improvement in revenue, and a 10–20% improvement in the speed of moving prospects through the sales process, "PreSales doesn't get much airtime in the C-suite—even though it gets a significant chunk of company resources, typically accounting for 30–50% of overall commercial headcount."[3]

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[2] https://hbr.org/2015/02/to-improve-sales-pay-more-attention-to-presales
[3] https://www.mckinsey.com/business-functions/marketing-and-sales/our-insights/to-improve-sales-pay-more-attention-to-presales

3

WHAT THEY
DO

Sales Engineers perform many different tasks. As you can see from the graphic below by demo automation software company Consensus, SEs are asked to contribute in a variety of ways, including giving demos, holding consulting calls with prospects, planning and architecting solutions, and overseeing proof-of-concepts (POCs), to name just a few.

In addition to these tasks, the benchmark survey report by Vivun, a PreSales Management software company, found that "15% of PreSales' time is spent on helping customer success, services, and other non-quota-retiring work." Because PreSales keeps an eye on both the technology as well as the bottom line, they're often the go-to-internal-resource even though they may not be measured or compensated for that work.

The fact that SEs are generally assigned to work with multiple salespeople further illustrates the importance of their role as well as their level of productivity. In the 2021 Sales Engineer Compensation and Workload Report by Consensus, SE practitioners reported an SE to Sales rep ratio of 4 to 1 while Sales leaders reported that ratio to be 3 to 1. This could be indicative of a disconnect in perceived workload between leaders and practitioners. With this kind of leveraged ratio, CROs and others overseeing revenue should focus on making the PreSales function more efficient and more effective. At a 4:1 ratio, any incremental improvement in an SEs effectiveness has a dramatic leveraged impact on the entire revenue process.

Graphic Courtesy of Consensus

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4

WHY THE
ROLE MATTERS

While buyers are now more educated about the solutions they seek prior to engaging with vendor organizations, they still struggle to discern which solutions best fit their needs from a set of choices that all appear to be viable and claim to lead in their space. Once they engage with a vendor's sales organization, buyers want to see evidence or proof that the vendor's solution will;

· Address their specific functional and higher level business needs
· Integrate with existing systems, data or processes they deem critical
· Allow their employees to easily adapt their work to the solution
· Fit their long-term needs based on the solution design or architecture

During this engagement process it's the SEs that solidify the buyer's view of the solution fit, eliminate or reduce the buyer's perception of risk, and become the trusted technical advisor that the buyer feels comfortable working with.

The role provides a key conduit between sales and product management. The input that SEs provide and the awareness that SEs have of how customers use their solutions can be used to drive product roadmap, build or enhance product marketing messaging, and create demand through social channels and marketing events.

Most SEs work within the Sales organization of their company. As such they can provide a balanced view of sales opportunities that helps to improve the quality and accuracy of the sales pipeline. Sales members view the SEs as critical to their effectiveness in achieving sales targets, advancing their own knowledge of how their solutions are used, and working as partners to establish broad trusted relationships with customers.

This is likely why companies like Zoom went from 50 to 400 SEs, Snowflake reportedly grew from 75 to 500, and ServiceNow now employs over 1,000 SEs. It's also why companies like Atlassian are introducing and building their first SE team.

5

EXISTING
TOOLS

SEs are the last of the sales personas to have dedicated technology.

They've been getting by using CRM – which is not built for what they do - along with tactical solutions that aren't quite up to the task.

CRMs are designed for one-dimensional data input and workflows and lack both the speed and the functionality required by an SE. For instance, SEs need the ability to track the technical needs of each prospect and the over-all needs of the market in terms of product and functionality. CRMs aren't set up for that.

According to Chris White, CEO of TechSalesAdvisors, "I believe technical presales – or the "Sales Engineer" as they are often called – has been the most underserved role in the sales training/sales enablement space for years. As a result, they've had to create their own tools and training. The reality is they do a lot of the heavy lifting in the middle of the funnel, using mostly homemade, bootstrapped tools. But that trend is changing, and it's going to make a lot of sales organizations that much more efficient and effective"

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PRESALES
TECHNOLOGY

Given the importance of the PreSales organization and the Sales Engineer role, and given that they have been getting by with ad-hoc technology even though they hold a lot of knowledge regarding market demand, desired features, and prospect challenges, it's time to highlight technology designed just for them. Fortunately, there are now many options to pick from. This report describes solutions that can help SE organizations best utilize their capacity to help propel growth.

In our research, we've identified eight separate categories of solutions that are designed – or offer special utility – for PreSales organizations.

1. PreSales Management

2. Demo Automation

3. Demo Creation and Live Demos

4. Live Presentations

5. 3D Value-Selling Models

6. Proof of Concept (POC) Management

7. Deal Collaboration Platforms

8. Deal Coaching & Team Selling

PRESALES
MANAGEMENT PLATFORMS

Solutions
Hub (https://hub.inc/)
Vivun (https://www.vivun.com/)

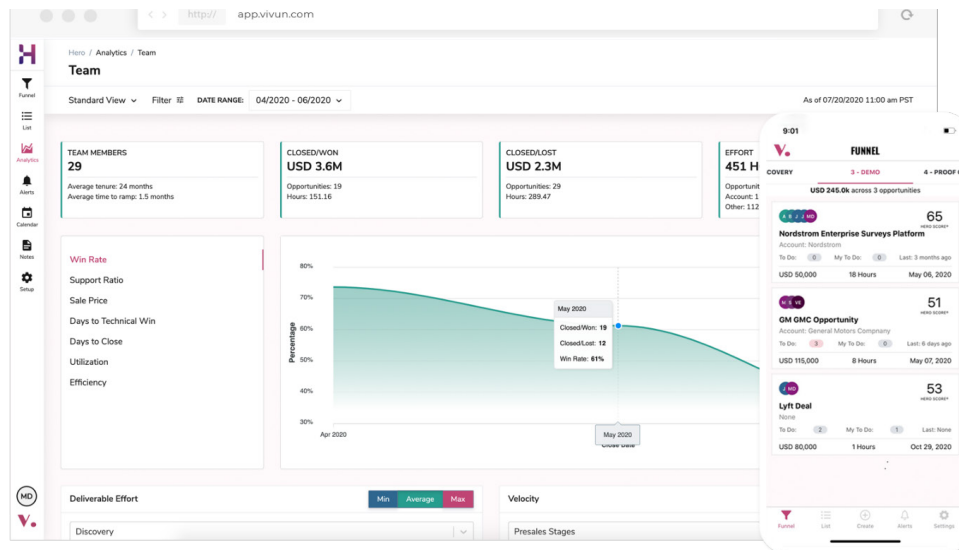## What are PreSales Management platforms?

PreSales Management platforms are designed to help sales engineering (SE) managers and individual contributors do their daily work more effectively. The technical selling needs related to process, people and product are different for SE teams compared to sales rep teams.

As a result, a modern PreSales Management platform will include data analytics capabilities so that leaders can run their teams as a business, the ability to use AI to help provide a PreSales view of the sales forecast, and an AI-powered ability to collect, cluster, and communicate product feedback at scale so an enterprise can continually find and shape product market fit.

Presales Management solutions help organizations allocate resources, pinpoint product opportunities, track and analyze technical-win activities, and facilitate internal collaboration within the Presales team and with other appropriate departments.

Courtesy of Vivun

With that in mind, it's not hard to understand why typical CRM fields and workflows simply aren't suitable to effectively help SEs do their work or enable SE managers to operate their business or to ensure that revenue operations (RevOps) get a complete view of the business.

Indeed, PreSales Management platforms can help SE managers and individual contributors with many tasks as depicted in the following graphic.
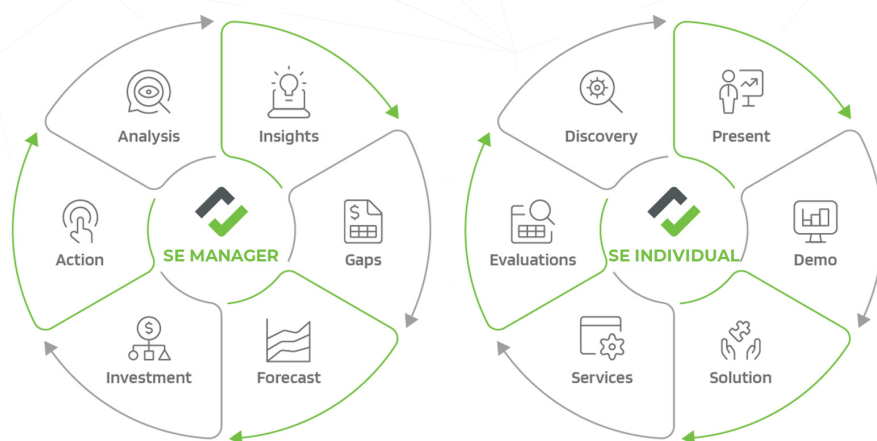
Courtesy of Hub. See Wheel Definitions Here

PreSales Management platforms are specifically designed to help SE managers and individual contributors optimize processes and playbooks that repeat best practices, effectively sell products, and streamline team-selling collaboration between SEs, product managers, sellers and subject matter experts (SMEs).

What it's not

It's not a CRM, although it synchronizes data with CRM and other tools like Slack, Email, cloud storage and customer support. Think of it as a workspace for PreSales, designed for their needs and for the way they work but fully integrated with a standard CRM such as Salesforce.

Why you need it

It is now common wisdom, that every company is becoming a software company or at the very least, will be defined by software. In a 2016 article in the Harvard Business Review, Vijay Gurbaxani, the Founding Director of the Center for Digital Transformation (CDT) explained his views on why it's important to think like a software company and offered several suggestions for how to do it.[4] One such suggestion is to "Build an adaptive organization with the right leadership structure."

Elaborating on the suggestion, Gurbaxani explained that businesses must shift their management focus to the "mechanisms of value creation in a software-driven world: **knowhow**, **innovation**, and **adaptation**."

What does this have to do with PreSales and PreSales Management platforms?

For one, PreSales teams are in the best position to identify, document, and communicate buyer and market trends (the knowhow) that enable Product teams to prioritize product roadmaps. They are the ones who connect the worlds of the field, the customer, and the product.

PreSales Management platforms provide for a real-time exchange of information between the field and product management to consistently deliver high value products ahead of the competition (the innovation).

The key is that these platforms have functionality to enable agility (adaptation) by way of surfacing previously unavailable insight on technical gaps and outcomes by effort (results of activities, resources, and deliverables). They can do this through deep integrations with not only a standard CRM, but with tools in which Product teams live, such as Jira, Github, and Azure DevOps.

In the digital sales era, where buyers buy remotely and more vendors have product-led sales motions, SEs play an ever more critical role in the revenue funnel.

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[4] https://hbr.org/2016/04/you-dont-have-to-be-a-software-company-to-think-like-one

SEs also have a tremendous multiplier effect on quota attainment goals, as they can support anywhere from 1 to 10 quota-carrying sales representatives.

PreSales will likely play the starring role in value creation building, market-inspired product evolution and innovation, and identification of competitive models that support profitable growth.

Benefits of Presales Management Platforms include:

- **Competitive product differentiation**
  - Ability to prioritize product roadmaps based on the business impact of market demands and opportunity quantification rather than gut feel. Managers should be able to obtain a macro view from "the field" on gaps that are blocking growth and use this data to collaborate with product management to remove any growth blockers. This can be done through the use of AI intaking, clustering, and categorizing various technical and opportunity blockers, tying them to pipeline and revenue.
  - Solutions should include integration with Product tools such as Jira and Github to provide a clear, data-driven prioritization of what features need to be built. Similarly, integrations back to PreSales will communicate to the field when new enhancements re-open opportunities for products to be sold or resold.
- **Team optimization**
  - Performance metrics that justify headcount, spot skill gaps, and promote key players. At the same time, the platform should enhance individual productivity with calendar integration, collaboration tools that offer cross-team notes and templates, and knowledge sharing to help with skills development and onboarding.
  - Rather than Slack messages or a round robin approach, a resource allocation feature enables leadership to assign the right team member to the right opportunities based on skill sets and deal requirements.
- **Smarter strategies**
  - Effortlessly enables teams by recommending the strategies known to remedy risky deals or bolster opportunities.
- **Smarter forecasts**
  - Automating data capture eliminates the burden of data entry while fueling analysis that results in a more trustworthy and accurate view of the pipeline, using AI to quantify technical blockers and opportunity gaps in order to create a PreSales view of the forecast that can be run alongside the main Sales forecast. Ideally, the forecast offers a clear, natural-language explanation of the score it places on each deal, as well as specific steps that can be taken to improve deal velocity and increase chance of closing.

DEMO
AUTOMATION

Solutions
Consensus (www.goconsensus.com)

What is Demo Automation?

Prospects want demos early and throughout the buying process. Each new stakeholder that joins the buying group needs a demo, creating massive demand and a huge Sales Engineering bottleneck. According to the 2021 Sales Engineering Compensation and Workload Report 60% of prospects wait at least a week for a demo.

Demo Automation offers the means for each prospect to get a self-configured and personalized video product demo without the help of a salesperson or SE. Prospects can dive into the specific areas of interest in their own time from wherever they happen to be.

Essential functionality includes the ability to create a broad set of content that speaks to the needs of different vertical markets, personas, and other criteria. With a few clicks, viewers indicate which topics or features most interest them.

	Not Important	Somewhat Important	Very Important
Feature 1	☐	✔	☐
Feature 2	☐	☐	✔
Feature 3	☐	✔	☐
Feature 4	✔	☐	☐

Viewers Identify their Priorities

Illustration from the Consensus Platform

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Automated demos can change with every view depending on the viewers' selections. This makes it possible for prospects to tailor each demo precisely so it's highly relevant to their situation.

The link to the demo is tracked so SEs can learn when the demo is viewed and what the areas of interest are for each prospect.

The prospect may also share the demo with their colleagues who must register to gain access. Because that activity is also tracked, sellers get powerful insight into the interests of each member of the buying team.

Graphic courtesy of Consensus

What it isn't

SEs may be hesitant to adopt demo automation, fearful of being replaced. Demo automation is not an attempt to replace the SE. Rather, it's a way to be more responsive to demo requests, shorten the time from interest-to-demo, qualify the interest of each prospect, and scale the number of prospects who get the information needed for them to advance to the next stage in the sales process.

With the insights derived from demo automation analytics, SEs are better equipped to add more value to each prospect conversation.

Why you need it

Recent research shows that the median time between when prospects request a demo and when they get a demo is five business days. Furthermore over 60% of respondents indicated prospects had to wait at least a week while 20% said they have prospects waiting at least 2 weeks for a demo. That's a terrible customer experience that leads to an elongated sales cycle and most-certainly, a lower win-rate.

An overflowing demand for demos results in overworked sales engineers performing monotonous, repetitive demos, and suffering from a lack of time for strategic consulting on high-value opportunities.

Benefits of Demo Automation Platforms include:

- **Ability to reach multiple stake-holders much faster**
  - o If it takes 4-5 time demos to reach the different buying team members and it takes two to three weeks to coordinate each demo, it will be 3-5 months before you can close a sale from the time of the first demo. See what your ROI will be.
- **It creates a better buying experience**
- **It frees SEs for high-value conversations and deeper discovery**
- **It's scalable**
  - o Live demos take up much more time which puts an incredible strain on your organization's ability to scale. Each SE has a limited caseload they can handle.
- **Consistency**
  - o Every salesperson or sales engineer does the demo differently. This adds a huge amount of variability into your messaging which can impact the customer experience and the outcome.
- **Market Insight**
  - o With every demo interaction, you're gaining valuable insight about buyer interest by industry or persona and learning which features or use-cases are of interest most often. See an Automated Demo

PRODUCT-LED
DEMO PLATFORM

Solutions

DemoStack (https://www.demostack.com/)
Navattic (https://www.navattic.com/)
Reprise (https://www.getreprise.com/)
Walnut (https://walnut.io/)

What is a Product-Led Demo Platform?

Buyers want to research information on solutions before talking with a salesperson. That's not news. Nowadays, they also want to see solutions in action, on their own and in their own time, to assess the ease of use and suitability. To meet that desire, companies are quickly identifying methods for letting their product stand on its own – in other words, sell itself. This go-to-market (GTM) approach is referred to as product-led-growth (PLG).[5]

Allowing buyers to experiment with highly technical solutions can be fraught with risk. Buyers can quickly go down a rat-hole when experimenting with complex, feature-loaded solutions. That's where Product-Led Demo solutions come in.

These solutions make it possible to create self-serve and rep-guided demos for various industries, personas, and use-cases so the best possible demo can be delivered to each prospect.

While these solutions are designed for self-serve/self-experience, they can also be used to present demos live to prospects. Salespeople and SEs can customize each demo for the client they're presenting to without having to stop and create demos from scratch using the live product.

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[5] For more information visit https://productled.com/blog/

What it isn't

A product-led demo is not the same thing as a video overview. Nor is it the same thing as a freemium subscription where a prospect gains access to limited features of a software solution. Lastly, it's also not the same as a free trial which gives access to the full "premium" level of features for a short period of time.
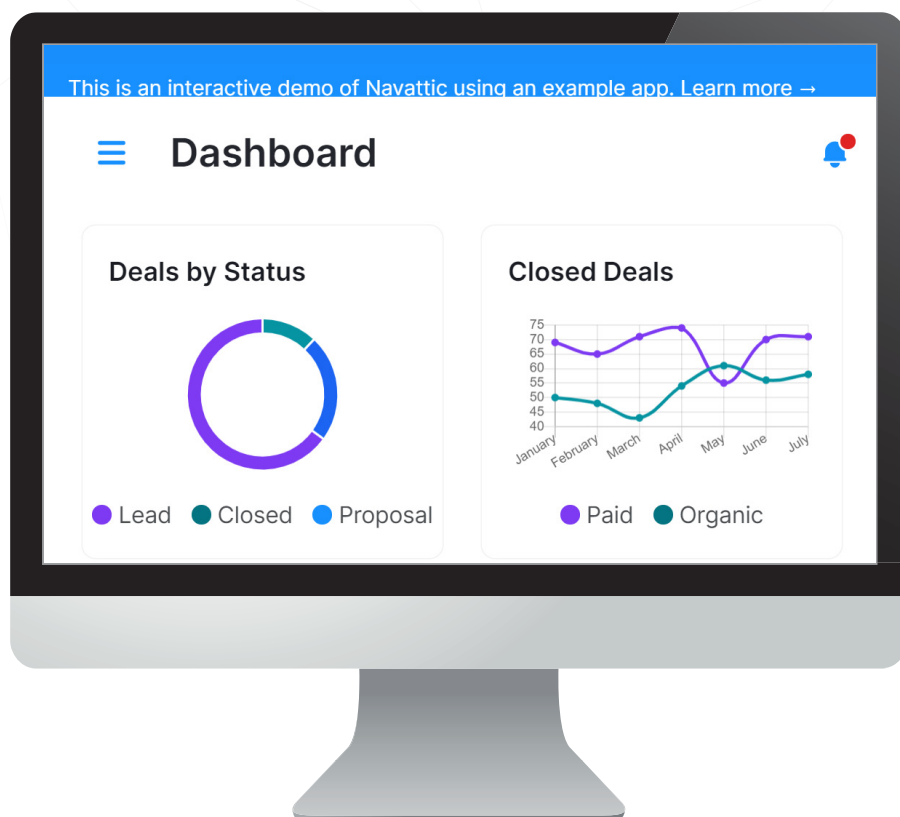
See this live product-led-demo example by Navattic

Why you need a Product-Led Demo Platform

Using a Product-Led Demo platform gives your prospects what they want which is a way to experience your product on their own terms. Rather than giving access to a freemium or free-trail with no data, no context, no sense of where to start, Product-led Demo platforms include data and screen flows that can tell the best story for each type of prospect. In addition, in-app messaging guides the user's journey, reducing the odds of giving up in frustration after getting lost in the app.

These demos can be served-up either as a leave-behind (sellers send to their prospects after a call) or as a top-of-funnel marketing call-to-action on a website.

Apart from self-serve, they can also be used by SEs to conduct live demos. Pre-built demos for different use-cases, industries, or personas reduce the chance of demo-malfunction.

Benefits of a Product-Led Demo Platform include:

- **Engagement**
  o Attract and engage high intent prospects who are motivated to try your solution.
  o Internal champion can share with buying team members.
  o Accessible on and off-line.
- **Personalization**
  o Allow your prospects to experience your product on their time. Selecting the specific functionality they're most interested in.
- **Scalability**
  o Eliminates multiple salespeople and SEs each spending time creating demos on their own.
  o Create customizable proof of concept (POC) demos much faster.
- **Analytics**
  o Identifies and standardizes on demos that work.
  o Identifies the most popular features across all demos and within market segments.

LIVE PRESENTATION
PLATFORMS

Solutions

ClearSlide (https://www.clearslide.com/)
Demo Flow (https://demoflow.io/)
DemoDesk (https://demodesk.com/)

What is a Live Presentation Platform?

There are obvious reasons why you'd want sellers to give a live presentation or demo. It's a chance to have a real conversation with the prospect.

Live presentation solutions offer a way to organize, prepare, and present a personalized collection of content based on the persona of the prospect or the nature of the call. Reps plan the content for each meeting and have it readily available during the call. And prep -time can significantly be reduced by creating presentation playbooks that automatically include the right slides, links to websites, and product demos.

Additionally, there are features that allow reps to take slides from master decks to create new, personalized decks easily.

What it isn't

It isn't a platform to create customized mock-demos (you would use product-led demo solutions for that). It's also not simply a content management or web conferencing solution. It has elements of content management, screensharing, video conferencing, playbooks, scripts, and meeting disposition functionality in one platform.

Why you need it

You could argue that sellers & SEs spend too much time building presentations, scheduling meetings, searching for the best, most up-to-date content, and logging activities into CRM. You could also argue that they spend too much time switching between disconnected tools. The mental[6] and productivity costs of switching between tools, not to mention the cost of the tools themselves can be staggering.

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[6] The True Cost of Multitasking Isn't Productivity—It's Mental Health

Because Live Presentation platforms include the functionality of online meeting, scheduling, content management, meeting prep and notes logging into CRM, you can improve both your financial bottom-line, and your teams' mental well-being. And because these tools are in one platform, you're also likely to increase adoption rates and thus the ROI on your investments.

After the live meeting (or even before-hand) you can send the presentation to the prospect or buying team members so they can self-serve the content. When prospects view shared content, you'll know who viewed it, when they viewed it, how long they viewed each piece of content, which parts of the content they had the most interest in, and who they shared it with.
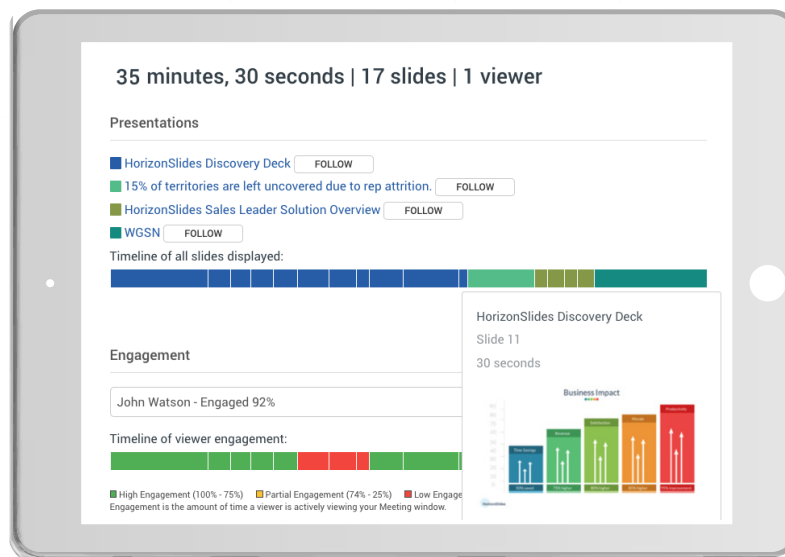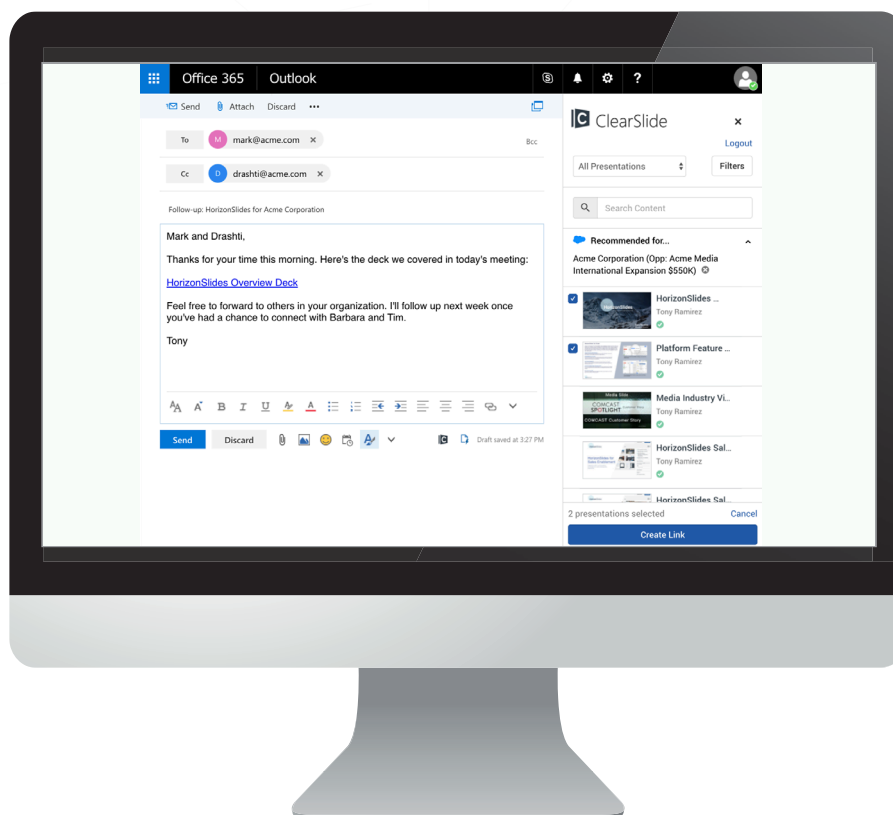

Graphic Courtesy of ClearSlide

Benefits of a Live Presentation Platform include:

- **More Engaging Presentations**
  o Combine various types of content like animations, value-selling tools, videos, slides, and online content into each presentation, whether you're sending or live-presenting it to a prospect.
- **Content and buyer analytics**
  o Engagement analytics help marketers improve content and sellers prioritize lead follow-up. Real-time alerts help sellers know it's a good time to pick of the phone and call the prospect.

- **Sales Agility**
  - o These solutions typically offer personal meeting URLs that don't require downloads or logins making it possible for sellers to instantly turn any call into an online meeting or demo.
- **Time Savings**
  - o Content and collections of content matched to sales stage, product line, or geography make relevant information easy to find, personalize and share.
- **Better Data**
  - o Sales activities, content usage, and engagement data are automatically logged into CRM.

Graphic Courtesy of ClearSlide

3D VALUE-SELLING
MODELS

Solutions
EMMa3D (https://www.emma3d.com/)

What is a 3D Value-Selling Model?

This category of solutions is perfectly suited to selling technology and other complex solutions. It's exciting technology because it offers a different way (a 3 dimensional way) to explain non-physical things like data, technology, roles and processes. PowerPoint and other digital slide show solutions are good for *presenting* information, but they fall short when it comes to *explaining* information helping people visualize how it all works.

3D value-selling models offer an easy-to-understand visualization of even the most technical products and solutions and how and when those solutions translate into value. Prospects can quickly grasp exactly how a product works, how it would interact with their systems, and the financial impact on their organization.
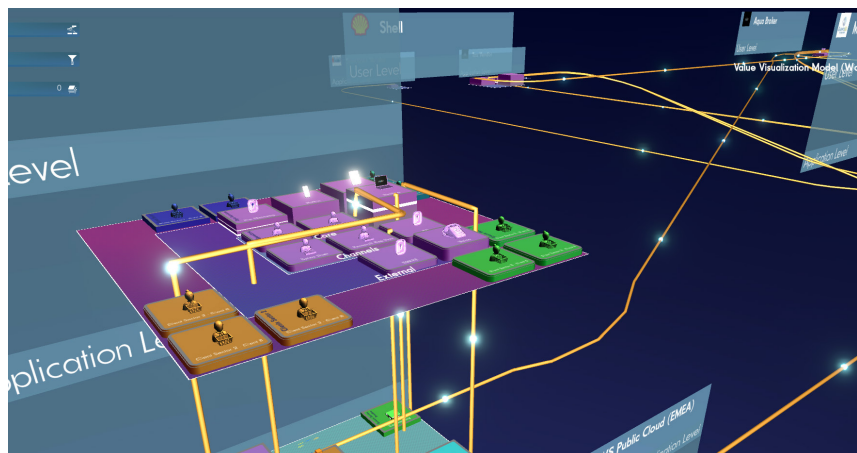
What it isn't

It's not a 3D model of a physical product. Rather it's a model of how a product or service impacts a process that includes people, technology, and outcomes.

It IS NOT this   **It IS this**
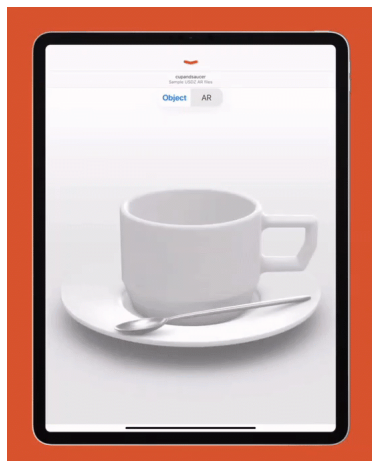
Click on images to view

Why you need it

Prospects that understand how your offerings will work within their own environment are a lot more likely to buy than those who don't understand—plain and simple. Slideshow presentations and lengthy technical write-ups shared with a prospect are information types that require interpretation and mental visualization. They depend on the prospect's imagination. Not so with 3D Value-Selling models.

It is true that much of a technology sale involves selling a vision or a story to a prospective client. However, in the average technology sale, there are 6-12 people who will need to be able to give a green light to the deal, somewhere in the middle of the funnel indicating that they:

· Understand 'enough' regarding how the solution works
· Understand how it fits their current environment
· Can see how value will be delivered
· Know how the implementation will be rolled out

A 3D Value-Selling model shows a prospective client what they need to see to give this green light, in a way they can understand, no matter what their particular background is. It includes data, technology, people, processes and value metrics in one, clear artifact, mapping out change over time.

Benefits of a 3D Value-Selling Platform include:

- **Aha moments**
  o These models provide a holistic perspective of your solution and how it integrates with the prospect's current situation in a way that brings clarity and understanding.
  o This speed to clarity shortens your sales cycle.
- **Differentiation**
  o With 3D Value-Selling models you never run off the edge of the page; the model can be as comprehensive as you need, within the 3D space, showing your prospect a view that your competitors are unable to communicate
  o 3D Value-Selling models use animation to depict dynamic processes, running through the model, showing their interaction with people and technology but also making your presentation as memorable as it is clear
  o The time element in 3D Value-Selling models enables you to clearly communicate the 'bridging journey' from the prospect's current state to the future state
  o How you sell is just as important as what you sell. 3D Value-Selling Models are a unique way of communicating product capabilities and ROI that sets you apart from the competition.

PROOF-OF-CONCEPT
(POC) MANAGEMENT

Solutions
HomeRun (https://www.homerunpoc.com/)
Success (https://www.success.app/features/)

What are POC Management Platforms?

Buyers use Proof-of-Concept (POC) or Proof-of-value (POVs) exercises to test and validate the feasibility, functionality, and suitability of a solution. Prospect companies request POCs when they have strong confidence and interest in a solution and need to take the next step which is to validate their assumptions.

POCs often spell out the pain points prospects are looking to solve, the technical requirements to be considered or tested, the specification of use-cases, and expected success metrics.

POC Management platforms provide a means to gain agreement on the above, to determine roles and responsibilities and time-lines, and to collaborate both internally and with the buyer throughout.

Presales organizations who seek out a POC Management platform, are looking to gain visibility into the status of each POC, the workload required of PreSales team members, and an understanding at any point in time, of the sentiment not only of specific buyers but also across the totality of buyers.

What it's not

POC management platforms are not to be confused with virtual trial or demo environment tools like CloudShare. Those tools are designed primarily to speed the delivery of a virtual demo and the collection and analysis of engagement statistics. They don't tend to have the buyer collaboration and other features outlined below.

Why you need it

To generate enough interest that a POC is requested demands a significant outlay of marketing and sales resources. As well, those that enter POCs are highly motivated buyers. For those reasons, it is painful to lose deals during or after a POC.

POC Management platforms help to ensure success of each POC (and a purchase decision) by standardizing on best-practice processes, providing key insights, and inducing buyer collaboration throughout.

Courtesy of Homerun

Benefits include:

- **Better Outcomes**
  - o Ability to create best practice playbooks raises the overall performance of POCs.
- **Shorter Sales Cycles**
  - o Documented evaluation plans and success criteria help buyers move through the process more quickly.
- **Analytics**
  - o Learn what's working and what isn't to continuously improve over time.
  - o CRM integration means data is captured for more accurate analytics.
  - o Know the status of every POC and the workload required of every team member.

DEAL COLLABORATION
PLATFORMS

Solutions

DealPoint (https://www.dealpoint.io/)
Accord (https://inaccord.com/)
BoxxStep (https://boxxstep.com/)
Prelay (https://www.prelay.com/)
Recapped.io (https://www.recapped.io/)

What are Deal Collaboration platforms?

Deal Collaboration platforms help SEs, sellers and buyers work together toward a common set of objectives. It's not enough for each party to take separate notes from sales conversations, to send emails that bury important information like next steps and answers to questions, or to separately keep track of goals and objectives. That approach certainly lacks transparency and it most definitely opens the door to misunderstanding, misalignment and distrust.

The better approach is to implement a transparent method for governing the process and interactions between all parties.
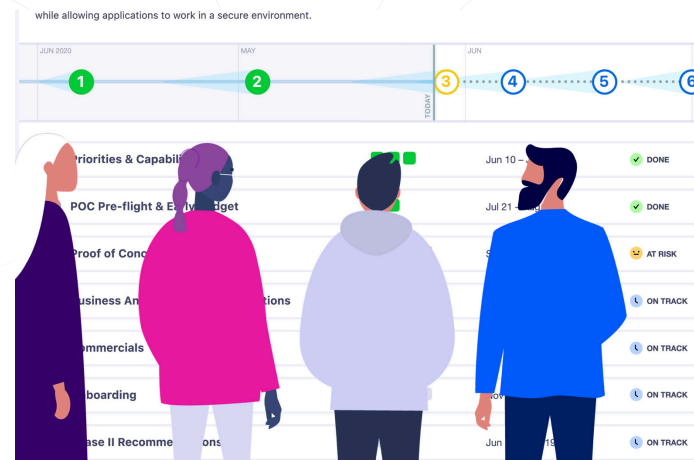
Deal Collaboration platforms provide mutual-action-plan and digital sales room functionality that allow the buyer and seller to collaborate, as well as a framework for outlining and tracking the project, milestones, and responsibilities. The platforms have a place to capture, gain agreement on, and manage the business drivers and outcomes that the customer wants to achieve. Some include functionality called "needs mapping" which is a depiction of the buyer's needs and the extent to which they're aligned to the seller's solution.

What it's not

It's not simply a platform for sharing content and contracts (think Digital Sales Rooms). It's also not the same as a POC Management platform as described above. Indeed, it's a little bit of both.

Why you need it

Aligning with each buyer's objectives is the goal of all modern sales strategies. SEs play an important role since they're often the ones to determine and demonstrate alignment. Unfortunately, alignment can't be determined if buyers aren't opened to working in concert with you. SEs and Sellers often try to solve this problem by offering as much information as they can. But information is no longer difficult for buyers to obtain. What buyers often lack is *context* (how do I make sense of the glut of information) and *process* (how do I move through the decision process).

You can give your buyers both context and process leadership by implementing a Deal Collaboration platform as a core part of your sales methodology. Mutual Action Plans (MAPs)—a key element of these solutions—ensure that everyone understands and agrees to the outlined efforts, actions, and dates. See "Ten Elements of an Effective Mutual Action Plan."

Without Deal Collaboration platforms, buyers and sellers are acting separately and without transparency which is a recipe for failure.

Benefits include:

• **Improved Buyer Partnership**
   o The process of surfacing all action steps with both the buyers involvement and agreement throughout develops a partnership and trust that's hard to beat.
• **Better Forecast Accuracy**
   o A quick review will tell you where there are risks for each deal. Whether it's that timelines are missed, or stakeholders are over-looked, you'll know exactly what to do to bring that deal in on time.
• **Higher close rates**
   o Utilizing a MAP helps both the buyer (and the seller) identify their internal process for buying as well as who should be involved in the decision process and why. Having that information outlined helps both sides spot any upcoming roadblocks or disconnects in the process.
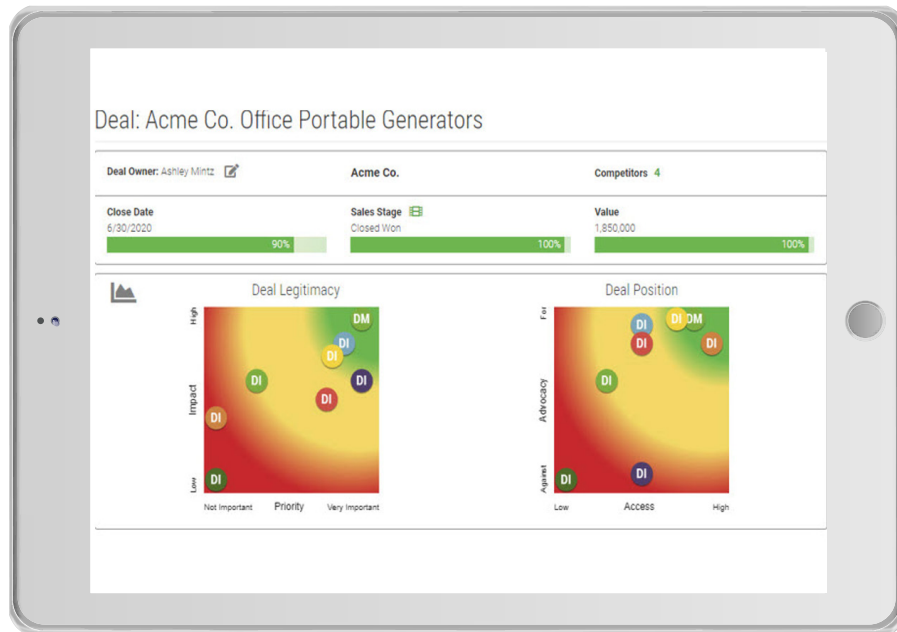
DEAL COACHING &
TEAM SELLING

Solutions
DealCoachPro (https://dealcoachpro.com/)

What are Deal Coaching solutions?

Deal Coaching solutions offer a framework for pressure-testing deals, checking for missing or inadequate buyer alignment, and other signals that indicate deal health.

Deal health is automatically calculated based on strength and weakness signals so both sellers and managers can see at a glance where to focus and what to do to keep deals on track for a close.

Screenshot Courtesy of DealCoachPro

What it's not

It's not the same as Deal Collaboration platforms which focus on collaborating internally and externally. Deal Coaching solutions facilitate *internal* collaboration and provide formal deal coaching with a repeatable process for assessing deal health and creating winning game plans.

Why you need it

Deal Coaching solutions can help sellers know which deals are worth pursuing based on built-in assessments. DealCoachPro's seller assessment is even patented. It assesses key relationships across five dimensions (Role, Impact, Priority, Advocacy, Access) using weighted questions that can be customized.

Standardized assessments make evaluating each deal a repeatable process.

There's less need to generate a new game plan for each deal because playbooks let you operationalize winning plans from deals with similar competition, requirements, or objectives.

Other benefits include:

- **Formalized deal coaching**
    - o   It's a repeatable way to introduce formal and scalable deal coaching.
- **Deal pursuit framework**
    - o   Standardizes and guides deal strategy and activity planning and facilitates structured conversations about each deal.
- **Team collaboration**
    - o   Virtual deal rooms facilitate team-selling and deal collaboration.
- **More Accurate Forecasts**
    - o   Visual heat maps provide instant clarity on seller's position in the deal and with key players.

MORE LEARNING

Resources

PreSales collective: The largest global community of PreSales professionals.

The PreSales Podcast: PreSales Podcast by the PreSales Collective is a podcast dedicated to growing the Sales Engineering and Solution Consulting community.

Product-led Podcast/Blog/Community: Join The World's Largest Product-Led Growth Community. Whether you're just starting to learn more about Product-Led Growth or are an expert, you'll meet world-class SaaS operators you can learn from.

Books

Selling Is Hard. Buying Is Harder: How Buyer Enablement Drives Digital Sales and Shortens the Sales Cycle by Garin Hess

The 6 Habits of Highly Effective Sales Engineers by Chris White

The Essential Guide To Navigate Your Proof of Concept by Tony Matos

Just F*Ing Demo!, Tactics for Leading Kickass Product Demos by Rob Falcone

Great Demo! How to Create and Execute Stunning Software Demonstrations by Peter Cohan

Product-led Growth: How to Build a Product That Sells Itself by Wes Bush

The Sales Engineers Handbook - Mastering Technical Sales by John Care & Aron Bohlig

Demonstrating To Win! by Robert Reifstahl