




# Presales Technology Buying Guide: Manage the buying process to get buy-in.

Presales tooling that optimizes the sales funnel is new to the C-Suite. When purchasing new tooling to automate and make your daily activities more efficient, consider these six steps in your purchasing journey:

## Step 1: Vision - **The art of the possible**

The need for change often incorporates a compelling return on investment, improved business agility, and work excellence.

 <p><b>Return on Investment</b> Deliver compelling economics to your organization.</p>	 <p><b>Business Agility</b> Easily embrace new ways of working and selling.</p>	 <p><b>Work Excellence</b> Elevate the performance of your leaders and contributors.</p>
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## Step 2: People - **Identify what is top of mind within your C-suite**

Frame your request in a way that maps to the things they care about.

### Chief Executive Officer



Increase enterprise value.

### Chief Operating Officer



Improve operational efficiency.

### Chief Financial Officer



Increase contribution margin.

### Chief Revenue Officer



Consistently deliver revenue growth.

### Chief Product Officer



Maximize product market share.

### Chief Customer Officer



Improve pre- and post-customer experience.

### Chief Technology Officer



Deliver innovative products that win.

### Chief People Officer



Recruit and retain top-level talent.

Clearly convey how your purchase will help the C-suite.

**“If I had one hour to save the world, I would spend fifty-five minutes defining the problem and only five minutes finding the solution.”**

- Albert Einstein

### Step 3: Process - **Map your internal checks and balances**

Cover your bases and be proactive about which stakeholders are involved in the purchase. Consider asking your vendor for guidance on which roles typically get involved and at what stage in the buying process.



#### **Executives**

Identify the key economic buyers with a budget that will sponsor your purchase. Make sure that it aligns with key executive initiatives.



#### **Influencers**

Enroll them early in the purchasing process and then align to support your purchasing recommendations. Make sure they are key influencers.



#### **Users**

Obtain validation that your users will benefit from the purchase of specific tooling. Ensure that they will use it and get value if you buy it.



#### **Blockers**

Understand their objections which could entail security standards, interoperability to customer relationship management (CRM), and/or other productivity systems. Be proactive in having answers to questions they will raise.

Building consensus within your organization will minimize purchase remorse and increase the likelihood of effective implementation and adoption.

### Step 4: ROI - **Develop a clear return on investment (ROI)**

Clearly understand both the logical and emotional ROI.



#### **Logical ROI Analysis**

Develop your business case, using as many metrics as possible, and quantify ROI with assumptions that will stand the rigor of your economic buyers and be an above-line initiative.



#### **Emotional ROI Analysis**

Ensure that you have the conviction and confidence both in your vendor and your organization to follow through on your utilization of the product to recognize your target ROI.

Enroll your organization to help realize the target ROI.

# “Change before you have to.”

- Jack Welch, former GE CEO and Chairman

## Step 5: Experience - **Verify the value is there from the vendor**

You can start small and expand when you are ready.



### Nibble

Experience the product. Ask for a trial and/or an in depth evaluation.



### Bite

Deploy in a small controlled group. Get data to validate your ROI assumptions.



### Gulp

Deploy globally utilizing internal references and validation of value recognized.

Move at your pace to build your conviction and trust.

## Step 6: Checklist - **Develop your plan to buy**

Build your to-do list.

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|--|--|
| <ul style="list-style-type: none"> <li>✔ Map your stakeholders</li> </ul>                  | <ul style="list-style-type: none"> <li>✔ De-risk change with proof points</li> </ul>       |
| <ul style="list-style-type: none"> <li>✔ Identity what matters to each</li> </ul>          | <ul style="list-style-type: none"> <li>✔ Build emotional consensus</li> </ul>              |
| <ul style="list-style-type: none"> <li>✔ Inspire stakeholders on your vision</li> </ul>    | <ul style="list-style-type: none"> <li>✔ Quantify expected return on investment</li> </ul> |
| <ul style="list-style-type: none"> <li>✔ Educate stakeholders on why change now</li> </ul> | <ul style="list-style-type: none"> <li>✔ Set a timeline for decision</li> </ul>            |

Make your list manageable and actionable.

Purchasing presales tools requires enrolling your C-suite, managing the process, having clarity on value and experiencing it in a controlled manner. For more information, reference this post, podcast and/or webinar.



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