5 STEPS TO SCALE YOUR PRESALES TEAM AND REDUCE TIME-TO-PRODUCTIVITY

Scaling up your presales team? Here's how to get ready to quickly onboard new sales engineers and reduce their Time-to-Productivity.

#1 ➔ DEFINE YOUR PRESALES STANDARD OPERATING PROCEDURES (SOPs) AND BEST PRACTICES

Type them out. Knowing them is not sufficient. New hires cannot read your mind!

Does your presales team assist with Technical Discovery? Then what should they ask?

Does your presales team give Demos? Then how should they prepare? Which demo assets or environments should they use?

Does your presales team lead Proof-of-Concepts (POCs) or Proof-of-Values (POVs)? Which test cases highlight your competitive advantages?

Your answers may depend on specific attributes about a deal. Different discovery questions for different customer types. Different demo assets for different use cases. Different POC/POV test cases for different products.

Documentation forces you to be specific and to refine your process.

It all seems obvious until you have to write it down. That is when you realize all of the steps, complexities, IF/THEN rules, caveats, exceptions, and so on.

#2 ➔ ASSEMBLE YOUR PRESALES SOPs AND BEST PRACTICES INTO EVALUATION PLAN TEMPLATES

Now that you have defined the 'what', define the 'how', 'when', and 'in what order'. Evaluation Plan Templates guide your presales team through each step, task, activity, and test case. Evaluation Plan Templates are also known as playbooks and action plans.

There are two template strategies to consider.

END-TO-END PLANS

With this strategy, you create a complete, end-to-end (e2e) plan with everything you do from the first touch point with a prospect all the way through the post-sales hand-off.

This strategy is good in concept, but it has challenges in practice. For example: You may not always run a POC, so should your e2e Evaluation Plan Template include doing a POC?

BUILT-AS-YOU-GO PLANS

The more common strategy is to build templates that are modular based on your presales stages, your products, your competitors, and so on.

Your presales team builds the evaluation plan as they go.

They get tapped to support Technical Discovery. Copy in the Technical Discovery template.

Then they need to deliver a custom demo? Follow the template for choosing the best demo environment.

Ready to conduct a POV? Add in the POV Setup template, the templates for the relevant Test Cases based the products being evaluated, and the template for your POV Close-Out.

Up against key Competitor X? Add the ‘Competitor X’ template which includes the special test cases that showcase your solution better than theirs.

#3 ➔ TRAIN YOUR NEW HIRES ON YOUR EVALUATION PLAN TEMPLATES

Make your new Evaluation Plan Templates available to your presales team.

Train them on when to use each one.

Coach them on how to tailor the final Evaluation Plan for each prospect.

Give them a way to track their progress through their Evaluation Plans and get notified about blockers.

Give them a way to share their Evaluation Plans with their prospects (in whole or in part).

#4 ➔ WATCH YOUR NEW HIRES RACK UP THE TECHNICAL WINS

Your new hires instantly follow the same presales SOPs and best practices that your top presales engineers took years to master.

But your new team members are doing it in days and weeks; not months and years.

#5 ➔ MONITOR PERFORMANCE TO IDENTIFY WHAT WORKS AND WHAT DOES NOT

No template is perfect, especially not your first versions.

Monitor your team’s performance, specifically Technical Win Rate and Presales Duration, to identify which templates and which elements of those templates are working and which are not.

Is your presales team following the templates or deviating from them? If they are deviating, find out why and what they are doing instead.

Refine your templates over time to keep improving your Technical Win Rate and reducing your Presales Duration.