



PRE-SALES CONSULTATIVE SELLING CURRICULUM

Mastering Technical Sales

2016 Curriculum Listing

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Mastering Technical Sales

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Consultative Selling For Sales Engineers – Outline Curriculum

This document provides a full listing of the various components of the Mastering Technical Sales curriculum of services and also demonstrates how one organization selected the workshops in conjunction with their own internal training agenda to develop the Professional Skills of their World Wide SE Organization. It is an anonymous customized sample of how we work with SE teams to tailor the program to meet their specific needs and requirements.

The workshops are divided into four broad categories based on content and experience level.

Level	Type	Description
100 Level	Foundational Skills	The basics of discovery and presentations
200 Level	Applied Skills	Applying The Basics
300 Level	Advanced Skills	For the Senior SE or Transformative Organization
400/700 Level	Management Skills	Presales leadership and management specific classes

The overall philosophy and content of the workshops form the basis for the Professional Skills required to transform a presales organizations from “Pitching Products” to Selling Business Solutions as a Trusted Advisor. They usually are a mix of your own internal, Mastering Technical Sales and other external supplier classes over a 12-18 month period.

Through our partnership with **Up2Speed Inc.** each workshop is available in English, Korean, Japanese and Mandarin and is customized to include your terminology, products and services plus, where applicable, tailored case studies and exercise examples.

“Absolutely the best training my team has ever received. An amazing return on investment. Thank You!”

VP, Global Solution Engineering



Fundamental Skills

MTS 100 – Boot Camp/ New Hire Workshops (Custom)

(Varies 1-5 Days)

These customized sessions are designed to dovetail into your corporate sales boot camp or New Hire program and provide specific product and domain expertise training for Sales Engineers coupled with industry best practices. Most basic sales training classes focus on the sales person and only provide the Sales Engineer with additional technology expertise instead of job-related Professional Skills.

MTS 101 – Sales Kick-Off Mini Sessions

(Between 1-3 hours each)

Customized sessions which take selected and small mini-components of the MTS curriculum and drill down on one skill area for a highly interactive, exercise-filled workshop which is perfect for fitting into a busy SKO agenda.

MTS 102 – The Demonstration Workshop

(Usually 1 Day)

Bring a team of SE's together with their demos, presentations and whiteboards. Spend a couple of hours covering concepts of the Perfect Pitch, then take the remainder of the day to reconstruct those customer-facing artifacts according to the best practices we just learnt. The end result is a set of memorable customer pitches that will instantly grab and retain the customer's interest.

MTS 103 – The Demonstration Workshop

(Remote)

One of our trained facilitators sits in on a live customer-facing remote demo or presentation and assesses the content and delivery of your standard solution pitch. This improves the delivery of your unique selling points and removes extraneous filler to sharpen your message with our ACCELERATE methodology.

“One short, 30-second tip from a workshop changed my entire technique. Now I no longer dread the faceless remote demo.”

Senior Sales Engineer - Singapore



MTS 104 – Business Discovery For Sales Engineers

(1 Day)

Discovery is the key to revenue – yet is often rushed. Just as in medicine, prescription without diagnosis is malpractice. How, as an SE, do you ask the right questions to get to the key business issues without diving down in the speed-and-feeds weeds? What are often missing are the capabilities to turn those issues into the three components of key business drivers. How, specifically, do you translate technical differentiators into Increasing Revenue, Reducing Cost or Mitigating Risk? How do you deal with situations that don't feel right and when you can't quantify the business (or technical) impact of your solution? Discovery is the way a SE learns what goes into The Perfect Pitch from the viewpoint of the customer. This class also introduces the concept of back-of-the-napkin ROI and gathering financial evidence to determine the impact of the potential sale.

MTS 105 – Presentation Mechanics For Sales Engineers

(1-1.5 Days)

A highly interactive class designed for 8-10 participants and deals with the mechanics and style of how to give “*The Perfect Pitch*” in a Technical Sales situation. There is a heavy focus on the Non-Verbal Communications aspect of a presentation, and how an SE can utilize these traits to control the room. Attendees are asked to prepare two 8-10 minute presentations before the class. One presentation may use PowerPoint; the second must utilize another form of media such as the whiteboard or posters. In addition, one presentation should be work/business related, and the second should be on a freely chosen personal subject to ensure domain expertise.

At the end of the class, each student is provided with a video collection of their “pitches” and will be presenting with greater confidence, and will be on their way to Mastering the Technical Sale.

MTS 109 – Technical Account Planning (Custom)

(1 Day)

This class is provided in two versions – one for the larger enterprise account SE, and a second version for the Small-Medium-Business or Commercial SE. This output of the class is a Technical Opportunity Plan (TOP) and a Technical Account Plan (Enterprise) plus a process, often in conjunction with the chosen Sales Methodology, which looks at how specifically to apply the Sales Methodology from an SE viewpoint. Topics covered include the concept of buyer risk from a technical and business aspect, uncovering the decision drivers, how to map the decision drivers into your solution and then converting “The Technical Win” into revenue.



Applied Skills

MTS 102/201 Workshop - Demos & Technology Discussions Mechanics

(1.5-2 Days: “Powering Up The Presentation”)

By some estimates every week 300 million presentations and demos are given - designed to sell, convince, persuade or inform an audience. 295,000,000 of them fail. This workshop guides SEs through the structure, creation and delivery of The Perfect Pitch so that their customer facing time is both memorable and successful. Each SE starts with a technical demonstration/presentation that is gradually refined and simplified throughout the course of the workshop. Covers the mechanics of technology discussions, the 3by3by3 structure of a demonstration, best practices for webcasts and multiple techniques to power up the message – all mixed with multiple opportunities for an SE to present to his/her peers or the entire class and gain constructive group feedback.

MTS 202 The Webcast Workshop

(1 Day)

A session specifically designed for those SE’s who spend a large amount of their time on the phone, dealing with customers via the internet. Covers demonstration and presentation techniques as they apply to remote situations. This is based on specific presentations and demonstrations the SE provides which are then refined and adapted during the class.

MTS 204 – Selling Solutions For Sales Engineers (S3E)

(2 Days)

This workshop is a more advanced and extended version of MTS 104 – Business Value Discovery. The focus is on discovering the underlying business issues of the client and then translating those issues into the technical business advantages of your solution. We expand the training into competitive differentiators, the true value of leveraging the features-advantages-benefit trio and matching resources, timeframes (and budget). The final module is a “prove it” session where each team puts together their best solution design and proposal/pitch in a simulated client environment.

“This is the perfect class to start the transition from a highly technical feature/function technical team into a more consultative business oriented approach. We also learnt a lot about ourselves!”

Director, Systems Engineering – Europe – Networking Company



MTS 205 Answering Questions (aka Objection Handling)

(1 Day)

A class that covers the fundamentals of answering customer questions (including why 90% of the time it really isn't objection handling). Looks at categorizing the question, a methodology for dealing with the question and the LACE mnemonic (Listen, Accept, Communicate, and Execute). The class also generates a top-20 list of questions and positive answers to them.

MTS 302 White Boarding For The Sales Engineer (Our #1 Class!)

(1 Day) *Escape From PowerPoint Fatigue!*

This 1-day class teaches you how to use a white board/ poster board, a flip chart or even the back of a napkin to sell your company, your services and yourself. Learn everything from the basics of how to stand and why colors are important to special techniques for speeding along the discovery process and making the "big picture" make sense. Finish the class knowing how to design and deliver your own 6-8 minute whiteboard vignettes so that your customer will say "I see what you mean"!



Advanced Skills

MTS 301 The Perfect Pitch Master Class

(1 Day: Recommended class size 8 or less)

A highly interactive and videotaped class dealing with fine tuning the mechanics, style and content of "The Perfect Pitch". Designed for Senior and Principal Level Sales Engineers with the intent of turning them from A- presenters into A+ stars.

(MTS302 – White Boarding has been moved to the Applied Section)

MTS 303 White Boarding Design and Creation

(1-2 Days) - Requires MTS302

The workshop builds on the basics learnt in MTS302 and creates multiple presales specific whiteboards (usually product or solution set oriented) developed in conjunction with enablement and product marketing – and then delivers them to the field along with updated best practice training. Workshop can be physical or remotely delivered. (Uses the White Boarding sessions of *MTS302 – White Boarding For The Sales Engineer.*)

Either the class is based upon your existing white board layouts or we'll help you design and build a special layout for everyone to learn.

S3E/304 The Executive Connection

(1 Day)

The job of an SE is more than being a technical presenter – sometimes you need to be in front of an IT or line of business executive and explain how/why your solution will be of benefit to them. The #1 “ask” of executives from their vendor’s presales team is “someone who understands my business”. So now you are in front of that exec – what do you do? This workshop focuses on succinctly summarizing technical and business concepts when in front of a customer executive using a series of situational case studies.

MTS 306 White Boarding For Sales

(2-4 Hours) ***Escape From PowerPoint Fatigue!***

A half-day or less class which teaches account executives the fundamental principles of white boarding and also a standard “executive/big-picture” pitch to draw. You can provide the pitch or we can design it for you as part of the custom work on the class.



MTS 307 The Trusted Advisor Sales Engineer

(2 Days)

Becoming a Trusted Advisor is not as simple as it sounds, which is why so many organizations either never try, or make a half-hearted effort. Trusted Advisor – two words, five syllables and fifteen letters hide a massive complexity. For the first time ever, there is now a workshop specifically designed to start the Sales Engineering organization on the journey to becoming a Trusted Advisor.

The workshop focuses on developing the professional skills to modify both the behavior as well as the actions required for an SE to be thought of as a Trusted Advisor. The practical components of the class show how a TA would act during a sales cycle compared to a transactional SE when in front of a technical, business or executive audience.

The outcome of the class is an SE built measurement scale and The Trust Equation – which provides a quantifiable method to measure the degree of Trust established between the SE and the Customer.

MTS 310 – Selling Through and With Partners (Custom)

(1 Day)

A custom class designed for those organizations whose sales model delivers a large proportion of revenue through indirect rather than direct channels.

MTS 313 – White Boarding (Electronic) Applied Techniques

(1 Day)

This workshop incorporates the use of electronic tools (such as the Zamurai tablet application) with predesigned whiteboards. These whiteboards are built using the best practices taught in MTS302 – White Boarding for the Sales Engineer. The first part of the session focuses on how to use the features and capabilities of the selected electronic assist tool in a sales situation. The second part features personal coaching geared towards producing a customer-oriented whiteboard that can immediately be used on the next sales call – whether face-to-face or virtual.

MTS 341 – Story Telling For The Sales Engineer

(1 Day)

The Storytelling module is an advanced level instructor led workshop designed to help you create a compelling message that is clear to your audience and helps them to take action on your ideas. You will learn how to put together a message that resonates with the audience and helps them to make decisions. This is all based on proven story techniques for delivering your message with impact and also for handling an audience that may be resistant to your ideas.

This is beyond the standard presentation training (MTS 101/105). This workshop deals with skills of Persuasion and Advocacy in the face of very complex solutions. It focuses on the bigger picture and helps to engage the audience emotionally which gets the audience excited to buy into your idea



The Video Series

Now for the first time we've recorded some of John's sessions and they are available on video. Each session lasts between 15 and 25 minutes and is a great addition to an SE onboarding, certification or learning development program.

#1 Risk And The Sales Engineer	Looks at the role that Risk plays in the customer decision making process and how the Consultative SE can reduce customer risk and accelerate deals by going beyond The Technical Win.
#2 Beating Your #1 Competitor	40% of the deals in your pipeline will be won by "No Decision Inc." Every methodology deals with pain, so how can the Consultative SE gently raise the pain level of the Status Quo/Do Nothing option?
#3 The Perfect Sales Call	This session looks at re-arranging the structure of the traditional sales call based on the science and research of attention theory. The exercises allow the SE to restructure their demos and presentations to maximize customer attention and message retention.
#4 The Three Drivers Of Business Technology Purchases	Every single technology purchase is driven by one of three business drivers. They are "Increase Revenue", "Decrease Costs" and "Mitigate (Decrease) Risk". This session focuses on tying the technology back to the business drivers to make the most of your technical strengths. It also looks at how CIOs never buy products, and never (despite what marketing says) buy solutions – they buy results and outcomes.
#5 The Trusted Advisor SE I	Trusted Advisor is one of those phrases that everyone uses, but is rarely defined for an SE, and never clearly expressed as a set of actions that can be put into practice. Part 1 looks at getting a clear picture of the trusted advisor position, and how to start the process of transitioning to a trusted advisor role with key influencers inside customer organizations.
#6 The Trusted Advisor SE II	Part 2 continues with a methodology to define the five component parts of trust, and provides a simple and practical way to measure those components. This allows the SE to develop a "Trust-score" for their customer relationships to track their progress and set strategies for continuing to develop the trusted advisor role.



Management Workshops

MTS 402 – Presales Management Training / Leadership Basics (Custom)

(Varies 1-3 Days)

Specialized training for the Pre-Sales manager combines HR, Technology, Business and Financial best practices with innovative coaching and mentoring techniques. If your organization promotes its best individual performers into managers with minimal role-specific training this course will pay back in only weeks. Designed for current and potential first/second-line managers.

MTS 403 - Coaching Demos & Technology Discussions

(1 Day)

Feedback on a demo or a technology discussion should be more than:

“How did it go?”

“Fine” or “You did great!”

Customer-facing time is golden selling time – as a manager you need to be out there watching how your SEs present and then providing them with constructive and directive feedback so that they can get even better. In this workshop John presents a methodology for managers to assess how their SE’s are doing in delivering The Perfect Pitch. He also examines the basic concept of feedback; different methods to provide feedback based upon personalities and a way for the TC to obtain feedback even you are not present. Managers participate in role-plays, exercises and a few are asked to come forward so that others may practice their feedback techniques.

MTS 701 Workshop – Metrics To Run The PreSales Business

(1 or 2 Days)

This workshop drills down upon the key metrics required to run pre-sales as a business. Many pre-sales organizations run blind on both a tactical and strategic basis, with only a short-term (but vital) emphasis on revenue. Using the Norton-Kaplan Balanced Scorecard methodology, revolving around People, Internal Process, Finance and Customers we help you prioritize and measure your key metrics. For example - can you answer?

What is the average cost of sale per opportunity?
How is that time actually spent?
What is your redo (“Mulligan”) percentage?
Who are your most productive Sales Engineers?
What is your personnel retention rate? By job category?
If sales is ready to sell, who in the company is not?

What % of time is customer facing?
What is your RFP win rate?
How many training days per headcount?
What is your trial/Proof Of Concept conversion rate?
Which products are wastes of effort to sell?



Feedback And Measurement

One consistent feedback mechanism during each session is that of Monday Morning Behavior. Each SE is encouraged to think and then document how they will behave differently when back in their home office the following Monday. This list should be reviewed by their immediate manager and incorporated into an individual plan. Each SE will graduate from the curriculum with

- A. The specific professional skills required to engage the customer in each of the standard SE work areas:

- Discovery
- Building Customized Content
- Presentations - Physical and Virtual
- Demonstrations
- White Boarding
- Handling Questions
- The Executive Connection
- Written Communications

- B. An electronic collection of short 6-10 minute video vignettes of their performance during each workshop.
- C. A Report Card detailing performance during each workshop, plus WWW/TALA commentary for their manager. (What Went Well, Take A Look At)
- D. Optionally, a structure to provide a presentation for certification purposes should you require such a system.
- E. A comprehensive “Monday Morning Behavior” list for potential inclusion in their quarterly and annual performance plans



Mastering Technical Sales - Basic Course Listing

Course	Description	Manager MiniSession?	Booster Shot Sessions?
MTS100	PreSales Engineer Boot Camp / Custom Workshops / New Hire	YES	YES
MTS101	Sales Kick-Off Custom Mini-Sessions	YES	
MTS102	The Demo Workshop	YES	YES
MTS103	Demonstration/Presentation Assessment		YES
MTS104	Business Discovery For Sales Engineers	YES	YES
MTS109	Technical Account Planning		
MTS201	The Perfect Pitch - Presentation Mechanics	YES	YES
MTS202	Remote Demo / Presentation Workshop	YES	YES
MTS203	RFPs , Trials and Evaluations (Custom Class)		
MTS204	Selling Solutions For Sales Engineers (S3E)		YES
MTS205	Handling Questions or "Objections"	YES	YES
MTS300	Solution Sales For Sales Engineers (Custom Class)		
MTS301	The Perfect Pitch Master Class		YES
MTS302	White Boarding For The Sales Engineer	YES	
MTS303	White Board Design and Creation		YES
MTS304	The Executive Connection	YES	YES
MTS306	White Boarding For Sales	YES	
MTS307	The Trusted Advisor Sales Engineer	YES	YES
MTS308	The Trusted Advisor Account Executive	YES	YES
MTS310	Selling With Partners (Custom Class)		
MTS313	White Boarding : (Electronic) Applied Techniques		
MTS322	White Boarding - Advanced / Master Class	YES	YES
MTS341	Story Telling For The Sales Engineer		
MTS402	PreSales Leadership Management & Coaching	YES	YES
MTS403	PreSales Leadership - Feedback Model for Demo/Presentations	YES	YES
MTS701	Metrics To Run The Presales Business		YES

Manager Mini Session is a 30-60 minute review of the class, Monday Morning Behavior introduction and discussion of areas for feedback/measurement and monitoring

Booster Shots are webcasts, phone calls and/or newsletters that emphasize current training and provide a few extra tips and techniques after the workshop is completed



A Sample Curriculum

This is an example of a sample anonymized curriculum that was designed for one of customers that blended together their own internal, Mastering Technical Sales and other external supplier classes. These particular steps were delivered as a Core Total of 8 days over an 18 months period. The broad development steps were:

1. Baseline all of the SE team with the 100-Level Presentation Mechanics and Discovery Classes.
2. Follow with 200-level Demo/Technical Discussions and Presentations, 300-White Boarding and Objection Handling Modules. Webcast Best Practices are optional depending upon the sales requirements.
3. Graduate from the curriculum with the advanced 300-Level Trusted Advisor and Executive Connection Class
4. For Current and Prospective Managers, the MTS 402 Leadership Workshop or MTS 403 Coaching Workshop is highly recommended as a supplement to individual skills.

OUTLINE CURRICULUM FOR THE SALES ENGINEER

Fundamentals		Applied Skills		Advanced Skills	
MTS 105 Presentation Mechanics		MTS 102 Demo Workshop		MTS 304 The Executive Connection	
MTS 104 Business Discovery		MTS 201 Powering Up The Presentation		MTS 307 The Trusted Advisor Class	
Basic Technical Product and Services Training		MTS 205 Answering Questions		Vertical Subject Matter Expertise	
Sales Methodology Overview		MTS 302 White Boarding		Negotiation	
Vendor Training (MSFT, ORCL Cisco etc.)		MTS 202 Webcast Best Practices		Master Level Certifications	
MTS 109 PreSales Technical Account & Opportunity Planning for SMB or Enterprise		Certifications (CISSP,ITIL,CPA, PMP etc)		MTS 310 Selling Through and With Partners	
Written Communications (i.e. RFP, ROI, Quotes)		Financial Acumen		MTS 301 Presentation Master Class	
		2nd Level Technical Product and Services Training			
Base Classes					
Optional Classes					
Customer Classes					

