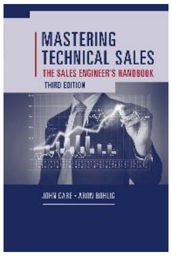

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SALES ENGINEER MANAGER METRICS

10 Metrics & Facts Every SE Manager Should Know

The MTS team has spent a lot of time over the past 18 months helping SE organizations, big and small, focus more on running their business as a business and less on being a reactive group of technical resources responding to the whims of a sales force. In order to do that you need to start setting some goals, and then monitoring and managing to those goals. Easy to say, not so easy to achieve.

In addition to those goals there are a number of metrics which every first and second line SE manager should know and be able to detail when asked by their boss. During the workshops we sometimes run an exercise and ask for the audience's opinion of what those "top-of-mind" metrics should be. They are almost always revenue oriented. Yet if you look at what the #1 objective of an SE Manager should be – it's to develop and serve your people. When you excel at that and a few other objectives then you are in the best position to help sales hit their number. So here are ten suggestions about facts and metrics that an SE Manager should know – some are financial, others are not.

The Top Ten Metrics Lists

1. Development Plan For Every SE. Do you have a development plan in place for everyone in your team? When did you last review it with the SE and when did you last review it by yourself? How are they doing against the plan and are any adjustments needed based on time remaining and current activity?

2. Headcount/Candidate Pipeline. Even if you are at 100% headcount you should still have a pipeline of "warm" candidates you can heat-up when needed. Those candidates can be both internal and external (as long as you aren't stealing from other managers!). So how many potential candidates do you have? If you are not at 100% - what's the plan? How many people have your recruiters interviewed, how

many have you seen, how long has the position been open? Have you been seeking out referrals? (At the time of writing – May 2016 – the market is hot and there is a world-wide shortage of good SE's.)

3. Succession Plan. It's hard for you to be promoted if there is no-one to take your place! Who would be a good candidate to replace you? There may be someone in your group you are mentoring or someone who works in a different part of the SE team or the organization. Have you had that conversation with your boss?

4. Top 10 Deals In My Territory. Finally! The money. Depending on the size of territory and number of deals apply the 80/20 rule and focus where the money is. You should know enough to categorize each deal as Red/Yellow/Green and be able to walk through what has to be done next – including technical and business obstacles. In conjunction with your sales partner the two of you should know everything worth knowing about each deal.

5. Status Of Proofs Of Concept. You should know the status and plans of every POC, trial, evaluation or any other technically oriented task that will consume the time of your team. You should also, for the record if it is not done operationally, be keeping a history of these events so you can establish patterns. In particular map the timing of the POC against the month or quarter to establish likelihood of closure.

6. SE Version Of Commit-Forecast-Upside! Every organization has an official forecast (recorded in SFA systems like salesforce) and an unofficial version. One of the best unofficial versions is that maintained by the SE team. Most SE's are a little more pessimistic than their sales counterparts (as we're often more detail and problem/challenge oriented). One large software company noted that sales forecasts had an accuracy rate of +/- 29% while the SE's were +/- 12% . Don't hide this from your sales partner as its not a shadow or 2nd forecast!

7. Strategic Account Plans Do you have a Technical Account Plan (TAP) – which is different from a sales plan – for each large/strategic/important account in your

territory? Remember an account can be a customer or a partner/reseller. When did you last review the TAP? When was it last reviewed and synced with sales?

8. Next Quarter's Priorities. The only people paid to think about next quarter within your territory are you and your sales partner. On the principle of "90 days from now you'd wish you started today" are there any activities that you can start this week? Start can mean either planning or executing.

9. Revenue Generation Programs**.** Focusing on the Sales in Sales Engineer – what are some activities that you and your team can undertake this year that may result in increased revenue? That can be from new customers, existing customers, deal expansion, up and cross-sell, partner empowerment, competitive take-outs. It's better to have a plan and a program rather than opportunistically handle this. It is also a great way to get noticed by senior management and to get sales totally in your corner when you need to get something done that involves sending political capital.

10. It's All About You. What is the status of your career goals? When was you last 1 on 1 with your manager and when is the next one? Do you speak about this or is the conversation purely tactical. Do you have a mentor? Is there leadership or other Professional Skills training you can take or a pilot initiative you can lead? (Hint: Pre-Sales Metrics and Operations?)

Summary

These are ten suggestions. You certainly will have others. If you are a Director or VP – start asking for these. If you are a Manager- start thinking about and measuring these. It's time to make presales engineering proactive instead of reactive!

"The price of doing the same old thing is far higher than the price of change."

- ***Bill Clinton***

Talking Points is a monthly column authored by John Care, Managing Director of Mastering Technical Sales. For more information on this and other Sales Engineering topics visit the website at www.masteringtechnicalsales.com.

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