



## PRE-SALES CONSULTATIVE SELLING CURRICULUM

*Mastering Technical Sales*

## 2017 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 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](#) each workshop is available in English, Korean, Japanese, Mandarin, French and Spanish. We lightly customize each module to include your terminology, products and services and, 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 that 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 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 delivered in two custom 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 month 300 million presentations and demos are delivered - designed to sell, convince, persuade or inform an audience. 290,000,000 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. We base the class upon specific presentations and demonstrations the SE team provides which are then refined and adapted during the class.

### MTS 204 – Selling Solutions For Sales Engineers

(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. Recommended for a mix of experienced and newer SE's.

*"The SE's discovered how to understand the real question being asked, and why it was being asked – rather than immediately leap into the technology. What a difference! Now they truly answer questions instead of knocking down objections."*

*Senior Vice President, WW Sales – SaaS Company*

## MTS 302 White Boarding For The Sales Engineer (Still 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"!

*"We threw away our standard corporate visit Power Point deck and ran a facilitated White Board session with the visiting CIO and her team. We discovered four new opportunities worth over \$3m that we would never, ever, have known about otherwise!"*

*Director, Sales Consulting – Western United States & Canada*



## 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. This class incorporates non-verbal communication techniques, improvisational awareness and a working knowledge of attention theory.

### 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.

### MTS 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 (or even an internal) executive using a series of situational case studies.

### MTS 306 White Boarding For Sales

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

A half-day class, which teaches account executives the fundamental principles of white boarding and 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 become 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.

*“I’ve been an SE for twenty years. I thought there was nothing new to learn about the basic job function. Wrong! I now approach every customer interaction thinking about Trust and the trust factors.”*

*Master Principal Sales Engineer – Asia-Pacific Region*

## MTS 308 – The Trusted Advisor Account Executive

(1/2 to 1 Day)

A shortened, account manager-oriented version of the MTS 307 class. Intended for the sales partners of SE’s who have attended the full class.

## 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. Based on proven story techniques for delivering your message with impact and 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

Our Sales Engineering Leadership workshops are built around the dual frameworks of three fundamental role-specific imperatives for presales leadership and the five step SE lifecycle. The imperatives and lifecycle stages are:

| # | Imperative                    |
|---|-------------------------------|
| 1 | Develop And Serve Your People |
| 2 | Run Presales As A Business    |
| 3 | Serve Your Customers          |

|   | SE Lifecycle Stage |
|---|--------------------|
| R | Recruit            |
| A | Attract            |
| D | Develop            |
| A | Advance            |
| R | Retain             |

All of which require the basic skill – Rule 0:

### Know Yourself (Manage Your Own Time)

## MTS 401 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?  
 Does training match pipeline?



## MTS 402 – The Operations Sales Engineering Manager

(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.

As a result of attending this class, SE Managers will learn:

0. To differentiate between being a former-super-SE and a manager of people.
1. To highlight the skills and behaviours to modify in order to progress further in the role.
2. Create a positive understanding and definition of what a SE leader does within the context of the Intel Security sales organization. This typically replaces a vague “I know it when I see it” approach. We also further differentiate between managing and leading.
3. Re-Introduction and internalization of the 3 basic imperatives + RADAR
4. Relating the managerial role to customer and sales-facing situations
5. Generating, understanding and then utilizing metrics to run a proactive SE Organization.
6. Understanding how and when to ask for help.
7. To provide an outline Technical Account Plan construct.

To become an active and valuable part of the Sales QBR process

## 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 405 – Develop and Serve Your People**

(1.5 – 2 Days)

A custom workshop (as a follow-on to MTS402) with a focus on delivering and gaining acceptance of a proven, practical framework for generating the best results from your technical staff, earning their loyalty, and delivering a positive impact on your customers and partners. This workshop is suited for new managers, veteran managers, and all levels of management through Vice Presidents.

As a result of attending this class:

1. Technical Managers will gain understanding of the key elements of Leadership, Execution and Followership as they understand the market forces leading them to be more transformative technical managers. This understanding will assist them in attracting top talent from the market.
2. Managers will reinforce their learning of the 3 + 1 rules for successful management and leadership of their technical teams and critical cross functional relationships.
3. Managers will learn the five component factors of successful team motivation and how they align with driving successful business results.
4. Managers will workshop through a series of a) role-plays, b) small and table-sized exercises, and c) real-life case studies, to converge upon a practical implementation of a team management framework consistent with the business objectives of their teams and the culture of the organization.
5. We will exit the workshop with a jointly developed go forward plan for implementing this framework with accountability for execution.

## **MTS 411 – Strategic Leadership For SE Directors and Vice Presidents**

This class is intended for second and third line SE leaders. It focuses on the strategic side of the SE organization in terms of cross-functional efficiencies, overall branding, global participation & sharing, and higher-level metrics. We also incorporate multiple case studies and drill down on the coaching and mentoring of first line SE Managers.



## 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                    |
| MTS105 | Presentation Mechanics (Entry Level)                                      |                      |                        |
| MTS109 | Technical Account Planning  |                      |                        |
| MTS201 | The Perfect Pitch - Presentation Mechanics                                | YES                  | YES                    |
| MTS202 | Remote Demo / Presentation Workshop                                       | YES                  | YES                    |
| MTS204 | Selling Solutions For Sales Engineers (S3E)                               |                      | YES                    |
| MTS205 | Handling Questions or "Objections"  | YES                  | YES                    |
| 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                    |
| MTS322 | White Boarding - Advanced / Master Class                                  | YES                  | YES                    |
| MTS341 | Story Telling For The Sales Engineer                                      |                      |                        |
| MTS401 | Leadership - Metrics To Run The Presales Business                         |                      | YES                    |
| MTS402 | Leadership - The Operational SE Manager                                   | YES                  | YES                    |
| MTS403 | Leadership - Feedback Model for Demo/Presentations                        |                      | YES                    |
| MTS405 | Leadership – Develop And Serve Your People                                |                      |                        |
| MTS411 | Leadership – Strategy and Effectiveness for 2 <sup>nd</sup> Line Managers |                      | 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 designed with one of our long time customers that blended together their own internal, Mastering Technical Sales and other external supplier classes. These particular steps are delivered as a Core Total of 8-10 days over a 24 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 and Story Telling if appropriate.
4. For Current and Prospective Managers, the MTS 402 Leadership Workshop and MTS 403 Coaching Workshop are 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 (Architect/SME) |  |
| MTS 109 PreSales Technical Account & Opportunity Planning for SMB or Enterprise |  | Certifications (CISSP,ITIL,CPA, PMP etc)          |  | MTS 341 Story Telling                       |  |
| Written Communications (i.e. RFP, ROI, Quotes)                                  |  | Financial Acumen                                  |  | MTS 301 Presentation Master Class           |  |
|   |  | 2nd Level Technical Product and Services Training |  |   |  |
| <b>Base Classes</b>   |  |   |  |   |  |
| <b>Optional Classes</b>   |  |   |  |   |  |
| <b>Customer Classes</b>   |  |   |  |   |  |

