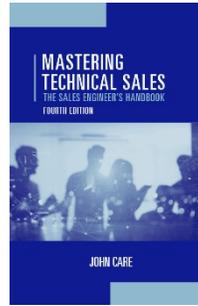




SALES ENGINEER
CONSULTATIVE SELLING
CURRICULUM
Mastering Technical Sales



2023 Curriculum Listing

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Mastering Technical Sales

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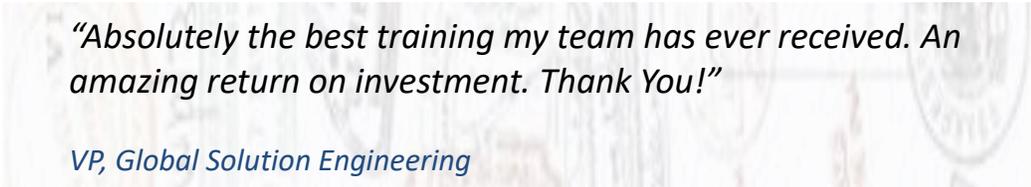
Consultative Selling For Sales Engineers – Outline Curriculum

We divide our workshops into four broad categories based on content and experience level.

Level	Type	Description
000 Level	Specialty Skills	Short sessions to grow a niche skill
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 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 organization from Pitching Products and The Dash To Demo into Selling Business Solutions as a Trusted Advisor. Those skills usually mix your own internal, Mastering Technical Sales, and external supplier classes over a 12–18-month period.

Through our partnership with [Up2Speed](#), each workshop is available in English, Korean, Japanese, Mandarin, plus Spanish. In addition, some of the more popular classes are now also available in French and German. We lightly customize each module to include your culture, terminology, products and services, plus, where applicable, build tailored case studies and exercise examples.



Specialty Skills – Mini-Workshops

MTS 075v – Remote Mastery Essentials

“Any questions?” The most typical and ineffective technique to “engage” a remote audience is occasionally pausing to ask *“any questions.”* The response is almost always... silence. Does it mean there are no questions? Was the audience even listening? Are we moving the deal forward? Is anyone even out there?

Presenting and demoing remotely adds a challenging dynamic that requires extra effort to maintain engagement from the participants to ensure that they follow along. But, most importantly, they are receiving and understanding what we are presenting so they can be persuaded in our favor.

This workshop covers some of the essentials of remote presentations and demos to ensure we maximize the results of these sessions.

The 90-minute workshop is delivered virtually using the webinar tool.

MTS 328 – Not Everyone Is Like You

We each have our behavioral quirks and preferences. So do our customers, the salespeople we partner with, and everyone else around us in our professional and personal lives. This class is an introduction to behavioral profiling, using a simplified version of DISC adapted to colors and the role of the Sales Engineer. It’s not about your profile; it is about understanding the psychology of working with others. It is your job to adapt to the customer, not the other way around. We apply the basic behavioral DISC characteristics to an SE’s everyday tasks, such as demos, presentations, and discovery, so that you learn how to make customer interactions more memorable, interesting, and compelling.

This workshop is available as a 90-minute and a ½ day session.

Fundamental Skills

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

(Varies 1-5 Days)

We design these customized sessions 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 salesperson and only provide the Sales Engineer with additional technical expertise instead of job-related Professional Skills.

MTS 101 – Sales Kick-Off Mini Sessions

(Between 1-3 hours each)

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

MTS 102 – The Demonstration Workshop

(Usually 1 Day)

Bring a team of SEs 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 learned. The result is a set of memorable customer pitches that will instantly grab and retain the customer's interest.

MTS 103v – 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 workshop 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 Value Discovery For Sales Engineers

(1 Day)

Discovery is the key to revenue – yet it 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 into the speed-and-feeds weeds? The capabilities to turn those issues into the three components of key business drivers are often missing. How precisely do you translate technical differentiators into Increasing Revenue, Reducing Cost, Satisfying Mission, or Mitigating Risk? How do you deal with situations that don't feel right and when you can't quantify your solution's business (or technical) impact? Discovery is how a SE learns what goes into The Perfect Pitch from the customer's viewpoint. 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 6-8 participants and deals with the mechanics and style of giving *"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. We ask attendees to prepare two 8-10 minute presentations before the class. One presentation may use slides; the second must utilize another form of media, such as a 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." They will be presenting with greater confidence and on their way to Mastering the Technical Sale.

MTS107 – The Special Challenge of SE Specialist/SME Teams

SME/Specialist SE teams are growing all around us. Acquisitions bringing more complicated technology, new products demanding more attention to gain share, and the demanding needs of customers are making specialist teams critically important. Still, specialist teams can struggle to integrate themselves successfully into sales processes and gain the Trust of core account sales teams. In this session, we will be workshopping some elements that can contribute to creating those integration problems. We will then examine these elements in detail and suggest remedial actions by SME/ specialists to avoid committing the "Seven Deadly Sins" of an SME/Specialist SE team and bringing the "Seven Virtues" into habits.

Applied Skills

MTS 102/201 Workshop - Demos & Technology Discussions Mechanics

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

By some estimates, over 300 million presentations and demos are delivered monthly - designed to sell, convince, persuade, or inform an audience. 290,000,000 of them fail. This workshop guides SEs through The Perfect Pitch’s structure, creation, and delivery so that their customer-facing time is memorable and successful. Each SE starts with a technical demonstration/presentation that is gradually refined and simplified throughout the workshop. We cover 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 numerous opportunities for an SE to present to their peers or the entire class and gain constructive group feedback.

MTS 202 The Webcast Workshop

(1 Day)

A session designed explicitly for those SEs who spend a large amount of their time on the phone, dealing with customers via the internet. It 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 refined and adapted during the course.

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 actual 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)

This workshop covers the fundamentals of answering customer questions (including why it isn't objection handling 90% of the time). We categorize the question, learn a methodology for answering the question, and the LACE mnemonic (Listen, Accept, Communicate, and Execute). The class also generates a top-20 list of questions and positive answers. We recommend this class for a mix of experienced and newer SEs.

“The SEs 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 223v Effective Remote Presentations & Demonstrations

(The virtual workshop consists of four discrete modules, with an estimated run time of 5 ½ - 6 hours for actual delivery and 8 hours with breaks.)

This instructor-led workshop is designed for sales engineers to improve their preparation and delivery skills for digital sales meetings. This 1-day workshop applies the twin principles of value-based selling and attention theory to digital sales meetings requiring remote/virtual presentations and demonstrations.

MTS 224 Creating The Memorable Demonstration

(1 day)

This online, instructor-led workshop is designed for sales engineers to improve their preparation and delivery skills for digital sales meetings. This 1-day workshop applies the twin principles of value-based selling and attention theory to digital sales meetings requiring remote/virtual presentations and demonstrations. It is the classroom equivalent of MTS 223v

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 whiteboard/ 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 standing and why colors are important to special techniques for speeding 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

MTS 302v The Fine Art of White Boarding

(Half-day virtual delivery of two modules)

This workshop is an online, instructor-led version of our MTS 302 workshop explicitly designed for Account Managers and Pre-Sales Engineers. The focus is on developing the planning and delivery skills to engage customers with Visual Selling instead of PowerPoint or Google Slides.

While the workshop delivery spans a half-day, there are other requirements for the student. Pre-work is assigned to prepare students for effective learning during the session. Homework includes students uploading a video of a presentation. Our instructor/facilitator reviews the Visual Pitch offline and provides direct feedback in WWW/TALA structure. (WWW – What Went Well) and TALA (Take A Look At).

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 to turn 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 MTS 302

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

We either base the class upon your existing whiteboard layouts or help you design and build a unique structure 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 benefit 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 in front of a customer (or even an internal) executive using a series of situational case studies. We also briefly review standard internal and external business drivers and typical financial measurement metrics.

MTS 306v White Boarding For Sales

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

A half-day class teaches account executives the fundamentals of whiteboarding 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 for the class.

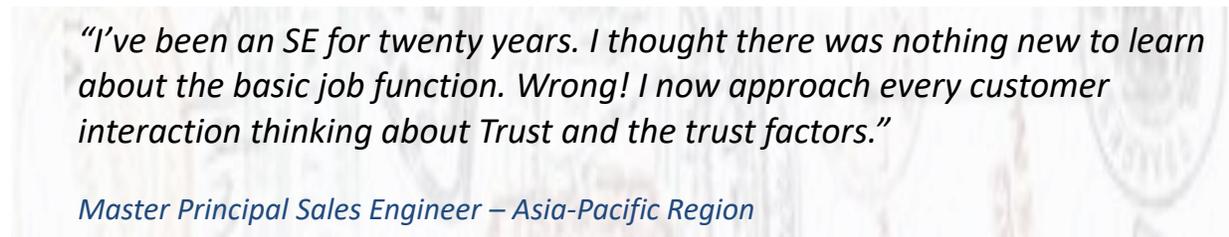
MTS 307 The Trusted Advisor Sales Engineer

(1 or 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, 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 the behavior and 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 a 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. It is intended for the sales partners of SEs who have attended the entire class.

MTS 341v – Story Telling For The Sales Engineer

(1 Day)

The Storytelling module is an advanced-level instructor-led workshop designed to help you create a clear, compelling message for your audience and cause them to take action on your ideas. You will learn how to create a message that resonates with the audience and helps them make decisions. Based on proven story techniques for delivering your message with impact and handling an audience that may resist your ideas.

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

MTS 344v – The Improvisational Sales Engineer

(1 Day)

Improvisation (“Improv”) isn’t just being able to stand in front of a crowd and tell jokes or act out funny stories. It’s about providing logical structure, rules, and thought processes to deal with whatever issues and problems customers and colleagues may throw at you. It also increases teamwork and collaboration between people who aren’t always “wired” the same way.

The workshop teaches the basics of improvisational techniques as applied to the Sales Engineer role. For example, what to do when your demo crashes, when a slide is wildly inaccurate, when the audience interrupts you, when your sales partner asks you to speak about a topic you know nothing about, or when the customer places you under time or deadline pressure.

MTS 345 – Negotiation And The Sales Engineer – Now Available!

(1 Day)

Most SEs think of negotiation as a “sales rep” skill. Yet SEs negotiate every day. They negotiate their time, priorities, POC requirements, what to show in a demonstration, and even who does what in a sales cycle – all with minimal training. This workshop focuses on approaching negotiation as a learned skill, with specific SE case studies, role-plays, and examples. In addition, negotiation requires preparation and analytical and communication skills, which are part of the standard SE job role.

The content examines classic negotiation techniques (“Getting To Yes”) blended with more scientific and high-stakes methods (“Never Split The Difference”). This results in a more confident and professional SE, whether negotiating within their company or with outside customers and partners.

MTS 350v – The Executive Connection (Improv Version)

(1-2 Days)

This workshop is a blend of MTS 304 – The Executive Connection and MTS 344 – the Improvisational Sales Engineer. Originally developed as a custom class for one of our larger clients, it is designed to prepare SEs for dealing with executives (internal and external) in ad-hoc or stressful situations. Driven by a series of connected case studies, the SE learns the basic principles of improvisation and then directly applies them to real-life situations.

The Video Series

Each video is designed to act as “learning in the flow of work” and features a 4–8-minute summary of many Sales Engineering topics and some One Minute Tips.

MTS VIDEO VIGNETTES – 2023 SERIES

#	Length	MTS4 ^e Book Chapter	Title	Contents
1	02:58		Monday Morning Behaviour	How to extract maximum value from this video series (and any other training)
2	05:05	All	The Value Of A Sales Engineer	SEs have tremendous value in a Sales Cycle. That’s what customers say .. and why it is a weapon we don’t use enough.
3	05:32	20	What Customers Really Want (From An SE)	What mid to senior-level execs in your customer base really want (and expect) from the SE.
4	08:10	6/7	Your #1 Competitor	The role of Risk in the Sales Cycle and how DNI – Do Nothing Inc. is often your biggest competitor.
5	06:15	6	The Three Kinds of Customer Pain	Identifying the three main kinds of customer pain – Latent, Current, and Vision.
6	06:22	7	The Three Wonderful Metrics (Three Wise Men + Big Sister)	Almost every tech purchase has a business driver – one, or more, of Revenue, Risk, and Cost.
7	05:17	8	The FABulous Sales Engineer	The simple concept of Features – Advantages and Benefits
8	09:29	7	5W+H Business Questions	A simple way to categorize business-oriented questions.
9	11:19	20	Making The Executive Connection	You’re in front of an executive. Now what?
10	12:05	19	The Trusted Advisor Sales Engineer 1	What does Trusted Advisor really mean?
11	14:20	19	The Trusted Advisor Sales Engineer 2	And how can you measure it (and use it) in sales?

12	08:10	6/7	Reversing The Conversation	Avoid talking techie until you know why the customer (or rep) wants you to talk tech.
13	04:01	10-14	The Power Of Three	A great technique to make a complex message easy to remember and understand
14	07:27	10-14	11 Signs That Your Demo Sucks	Some tactical things you can do to make the demo more memorable.
15	05:51	16	Storytelling And The Sales Engineer	The importance of storytelling and a quick template for powerful conversational customer reference stories.
16	08:24	18	Objection Handling (Answering Questions)	Why SEs answer questions vs. handle objections. The different types of questions and some basics around how to handle/answer them.
20	17:06	15	WB Basics #1	The Fine Art of White Boarding – Part 1
21	14:59	15	WB Basics #2	The Fine Art of White Boarding – Part 2
22	08:30	10	The Perfect Sales Call	A suggestion for an easy yet controversial way to restructure a sales call to gain more attention.
<i>OMT-1</i>			<i>The 60-Foot Rule</i>	<i>A simple and basic guideline to improve your presentations</i>
<i>OMT-2</i>			<i>The Grey Dot</i>	<i>A neat way to handle animations and not to “over-click.”</i>
<i>OMT-3</i>			<i>The Baked Cake</i>	<i>Start With The Most Important Thing For The Customer</i>

OMT = One Minute Tip

Management Workshops

At Mastering Technical Sales, we have been running Sales Engineer leadership workshops since 2014. As we gradually added more components to the curriculum, we decided to write a book about the topic. “*Mastering Technical Sales: The Sales Engineer Manager’s Handbook*,” co-authored by John Care and Chris Daly, was released in May 2020. It is the one and only book on the role-specific aspects of being an SE Manager and a SE Leader, and the reception within the SE community has been quite remarkable and uniformly enthusiastic.

We build our Sales Engineering Leadership workshops around the dual frameworks of the three plus one fundamental role-specific imperatives for presales leadership and the five-stage SE lifecycle. Every aspect of the various training modules aligns with one or more of those imperatives or stages. The imperatives and lifecycle stages laid out in the book are:

#	Imperative
0	Know And Manage Yourself
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

You can find a complete description of all the 400-level SE Leaders workshops (currently over 15 modules) in a separate document – [The SE Leadership Curriculum Listing](#).

Feedback And Measurement

One consistent feedback mechanism during each session is that of Monday Morning Behaviour. Each SE is encouraged to think and document how they will behave differently when back in their home office the following Monday¹. 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 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 Behaviour” list for potential inclusion in their quarterly and annual performance plans

¹ Or Sunday – depending upon your location.

Mastering Technical Sales - Basic Course Listing

Course	Description	Virtual Session	Manager Mini Session?	Booster Shot Sessions?
MTS075	Remote Mastery Essentials	YES		
MTS328	Not Everyone Is Like You	YES		
MTS100	PreSales Engineer Boot Camp / Custom Workshops / New Hire	YES	YES	YES
MTS101	Sales Kick-Off Custom Mini-Sessions	YES	YES	
MTS102	The Demo Workshop		YES	YES
MTS103	Demonstration/Presentation Assessment			YES
MTS104	Business Discovery For Sales Engineers	YES	YES	YES
MTS105	Presentation Mechanics (Entry Level)			
MTS107	The Challenge of SME/Specialist Teams	YES		
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	YES
MTS223v	Effective Virtual Demos And Presentations	YES		
MTS224	Creating The Memorable Demo (Classroom MTS223v)			
MTS301	The Perfect Pitch Master Class			YES
MTS302	White Boarding For The Sales Engineer	YES	YES	
MTS303	White Board Design and Creation			YES
MTS304	The Executive Connection	YES	YES	YES
MTS306	White Boarding For Sales	YES	YES	
MTS307	The Trusted Advisor Sales Engineer	YES	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	YES		
MTS344	The Improvisational Sales Engineer	YES	YES	
MTS345	Negotiation And The Sales Engineer	YES	YES	
MTS350	The Executive Connection (Improv Version)	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 completing the workshop.

A Sample Curriculum

This is an example of a sample (anonymized) curriculum designed with one of our long-time customers that blended 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 24 months. The broad development steps were:

1. Baseline 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 on the sales requirements.
3. If appropriate, graduate from the curriculum with the advanced 300-Level Trusted Advisor and Executive Connection Class and Story Telling.
4. For Current and Prospective Managers, the MTS 400 Leadership Workshop series are highly recommended to supplement 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 223 Digital meetings		Master Level Certifications (Architect/SME)	
Account Planning (incorporating sales techniques such as MEDDIC etc.)		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			
Base Classes					
Optional Classes					
Customer Classes					

