

The Sales Engineer Manager's Handbook

John Care
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Mastering Technical Sales



SALES ENGINEER LEADERSHIP CURRICULUM

Mastering Technical Sales

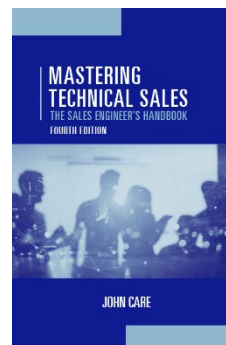
2023 SE Leadership Curriculum Listing

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2023 SE Leadership Workshops – Outline Curriculum

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

Workshop Listing

We designed each course to be either one module (approximately 90 minutes) or two modules (a half-day) in length, most of which can be delivered physically in a classroom or virtually. Although there are a few prerequisites and base requirements, each course is independent of the others.

The numbering system uses the 3+1 rules format. So, a “41x” class is a leadership class (the hundreds: 41x) and corresponds to Rule #1 “Develop And Serve Your People” (the tens: 41x). This flexibility allows our clients to mix and match according to their perceived needs and align with any mandatory internal HR-oriented training. This structure also enables a course to be run within a mini Sales Kick-Off format or as an entire 2-3 day event.

The next page provides a complete course listing, followed by a more detailed description of each course, including prerequisites and recommended “pairings.”

Course	Description	# Modules	Availability
Rule 0: Know And Manage Yourself			
MTS 401	Your Most Important SE – You (Basic Pre-Req)	1	YES
MTS 403	What Got You Here Won't Get You There	2	Mid 2023
MTS 406	The Art Of Saying “No”	2	YES
MTS 407	The Trusted Sales Engineer Manager	2-4	YES
MTS 409	Not Everyone Is Like You – Behavioural Analysis	2	YES
Rule 1: Develop And Serve Your People			
MTS 411	Develop And Serve Introduction (Basic Pre-Req)	2-4	YES
MTS 413	Creating A Culture Of Coaching	2-4	YES
MTS 414	Coaching First Line Managers	2	2023
MTS 415	Coaching For A Specific Initiative	2	YES
MTS 416	The Power Of Feedback (Exercise)	1	YES
MTS 417	Teamwork/Roles & Rules Of Engagement	2	YES
MTS 419	Coaching the Demo, Presentation, POC	2	YES
Rule 2: Run Your Business As A Business			
MTS 421	Building And Prioritizing Metrics	2	YES
MTS 423	Effective Time Management	1	YES
MTS 425	The Team Brand	1	YES
MTS 426	Reviewing And Streamlining SE Processes	1	2023
MTS 427	The Sales Engineer Quarterly Business Review	2	2023
MTS 429	Technical Account Planning	1-2	Mid 2022
Rule 3: Serve Your Customers			
MTS 431	Selling As (or Being) The SE Manager	2	YES
MTS 433	The Customer QBR	1	2023
MTS 434	Success With Selling (And Delivery) Partners	2	2023
MTS 435	Exec Connection For Leaders	2	YES
MTS 437	Cross-Functional Engagement	1	2023
MTS 439	Participating In The Sales QBR	1	2023

Colour Legend

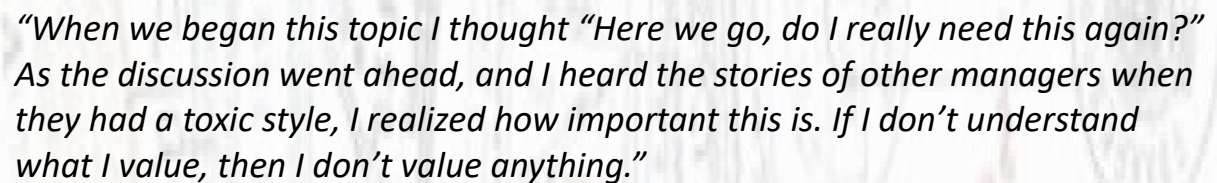
The Mindset Of A Leader	Foundational Material	Getting Your Head Right
Operational Leadership	Execute On The Foundations	Putting Values Into Practice
The Operational SEM	Tactical Execution	Specific Topics
Executive Leadership	For SEDs and VPs	High Strategy

Rule 0 Courses: Know And Manage Yourself

MTS 401: Your Most Important SE – You

This course introduces the 3+1 rules of SE Leadership, the importance of your Personal Brand as a leader, and determining the value of a Sales Engineer. It is the fundamental building block and prerequisite for other courses. We set the overall framework of the curriculum in the context of the SE/Sales environment and reinforce the imperative of building and refining values and “Why You Are Here” to guide the SE leader through their planning and decision-making processes.

This class is frequently paired with MTS 425: The Team Brand to create an initial ½-day session.



“When we began this topic I thought “Here we go, do I really need this again?” As the discussion went ahead, and I heard the stories of other managers when they had a toxic style, I realized how important this is. If I don’t understand what I value, then I don’t value anything.”

Senior Manager, Global Solution Engineering

MTS 403: What Got You Here Won’t Get You There

We promote an individual into a leadership position for a reason – often because they were (at one point) an exceptionally talented SE. However, as Marshall Goldsmith so eloquently explains in his book “What Got You Here Won’t Get You There” (WGYHWGYT), you need to let go of many skills and attributes that made you successful and build new skills. This course helps the SE leader (newly promoted or not) to examine their talents, gaps, and micro biases and create a plan to be more self-aware of their impact on their team and overall capabilities within the larger organization.

This class requires prework to read WGYHWGYT or How Women Rise (Helgesen/Goldsmith)

MTS 406: The Art Of Saying “No.”

This workshop focuses on tools and techniques an SEM can use to say No effectively. It investigates the psychology of No, why saying No can be a good thing and how to say No most effectively with the least amount of personal and professional damage. It is NOT an entire negotiation course, nor does it deal with compromise positions and win-win strategy – the emphasis is on saying No when the SEM should say No.

MTS 407 – The Trusted Manager

(1/2 to 1 Day)

This workshop takes the external customer-facing components of MTS307 – The Trusted Advisor Sales Engineer and pivots them for internal use. The focus is on the practical application of the critical element of being an effective coach: Trust. While becoming a Trusted Advisor Sales Engineer is an important goal to achieving shared success, becoming a Trusted Manager is imperative for leading a team. We explore why Trust is required to execute the Manager role with their employees and cross-functional colleagues and how to assess and build trust between new and existing team members. Includes exercises and case studies based on real-life scenarios. This is one of our most popular management workshops.

“This is a workshop for the “thoughtful leader”. It is another way to approach your internal relationships. Thinking about day to day tactical interactions through the strategic lens of the Trust Equation really opens your eyes. Plus, I loved the metrics side of the session – as Engineers we do like to measure things.

Senior Director, Global Sales Engineering

MTS 409: 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 Manager. It’s not about your profile; it is about understanding the

psychology of working with others. It is your job to adapt to your team, 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 your team's customer interactions more memorable, interesting, and compelling.

"As a Red (dominant/time-based) I learned to understand the personal viewpoints of the SE team in my country. We are a diverse and talented group of individuals, and I will treat each of them in the manner they learn best, rather than the manner that serves me the best. Thanks."

New first-line SA Manager, DACH Europe

Rule 1 Courses: Develop And Serve Your People

MTS 411: Introduction To “Develop And Serve Your People”

The course focuses on delivering and gaining acceptance of a proven, practical framework for generating the best results from your technical staff, earning their loyalty, and positively impacting your customers and partners. We will workshop the critical elements of Leadership, Execution, and Followership as they understand the market forces leading them to be more transformative technical managers. In addition, this understanding will assist them in attracting top talent from the market. Finally, managers will learn the five component factors of successful team motivation and how they drive successful business results.

We 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.

Designed for all levels of management, from new Managers through Vice Presidents.

“Operating across multiple countries, cultures and languages is a challenge. Building an overall Value Proposition for the SE organization brought us onto common ground and really drove increased sharing and teamwork. We immediately shared the outputs with our HR and Recruiting partners. Wonderful.”

SE Director, Singapore

MTS 413: Developing A Culture Of Coaching

SE Managers give us endless reasons why they don't coach. None of them are particularly good. Still, there is a trend that aligns with the core of every SE and SE Manager: we please others. Many managers see coaching as disruptive to our nature to please. Yet, most SEs tell us that their greatest ambition is to get better. And that they don't get enough coaching to be better. So why aren't managers addressing this need? Why don't we coach more?

This workshop demystifies managers' resistance to coaching and examines the Sales Engineer's specific needs. First, we explore the habits and practices of the best SEs and the development skills necessary to build these habits. Next, we extend our discussion to the reasonable needs we might have for each team member and what they expect from us. Finally, we investigate the foundational elements of a bilateral coaching environment and discuss a simple framework that replaces our anxiety over coaching with one of joy.

This course explores how coaching can be as much about the coach as it is about those managers coach. It is most effective when paired with MTS 407, "The Trusted Manager," and MTS 425, "The Team Brand." Another amongst our most popular Management Workshops.

MTS 414: Coaching First Line Managers

A course designed explicitly for SE Directors or VPs. The focus is helping your first-line managers round out their skill sets in all 3+1 aspects of the job. In addition, we explore the demands and targets of 2nd and 3rd line SE leaders allowing managers to align 2nd line objectives within 1st line strategies. This includes coaching techniques for first-line managers to build effective cross-functional relationships within Sales, Services, Support, and Product Management.

MTS 415: Coaching For A Specific Initiative

As your technology dominance grows, high-level customer strategies mature. As a result, the best companies build alignment between internal leadership strategies and engagement with customers and selling partners. Examples specific to the SE community include assessment-led selling, new product introductions, value realization, and driving higher product "stickiness" through broader customer feature/function adoption. This customized course takes the SE

contribution to the success of these strategies and equips the SE Manager with tools and techniques to better coach the SE in bringing it to their business.

MTS 416: The Power Of Feedback

An extended situational exercise to showcase the power of feedback. “Feedback And Frogs” highlights the power of positive feedback, corrective (negative) feedback, and what happens if you provide zero feedback. For example, 78% of individual SEs want more input from their manager, yet over 65% of managers feel they provide adequate feedback. The exercise promotes some insightful yet fun methods to make up the difference.

MTS 417: Teamwork, Roles, And Rules Of Engagement

“Selling is a Team Sport,” as is commonly said. What is the health of your team? Technology suppliers frequently refine their SE strategy as acquisitions are made, partnerships expand, and new roles are built to ensure customer outcomes. Suppliers dissect the market, place customers into buying classifications and build staffing structures that they hope optimize their business goals. They also leave it to their customers and partners to make sense of it all.

This workshop examines the roles of the sales engineer, the customer success engineer, the SME, the consulting architect, the partner SE, and all other roles that emerge within the SE organization. We build an effective ROE (Rules of Engagement) structure within the context of your roles, sales cycle, and customer adoption lifecycle. Clarifying your roles and rules prevents time-wasting confusion between partners and customers.

MTS 419: Coaching for the Demo, Presentation, and the POC

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 they can get even better. This workshop presents a methodology for managers to assess how their SEs deliver The Perfect Pitch. We also examine the basic concept of feedback, the cultural implications and limits of feedback, different methods to provide feedback based upon personalities, and a way for the Sales Engineer to obtain feedback even if you are not present. Finally, managers participate in role-plays, exercises, and a live format so that others may practice their feedback techniques.

Rule 2 Courses: Run Your Business As A Business

MTS 421: Creating And Using Metrics

This facilitated course drills down upon the key metrics required to run Sales Engineering as a business. Many SE organizations run blind on 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 are 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 the pipeline?

As we build on this, we look at the unique strategies within each SE team to examine those things that are effective in meeting goals and those that are less so. All to take the one item within a Manager's control – their people – and optimize their activity. Another amongst our most popular Management Workshops.

"Thank you for a great workshop. Feedback from folks after you left was that this was one of the most productive workshops that they have been a part of. Your unbiased approach and your ability to bring to the table your vast experience was valuable beyond words. I look forward to continuing down this journey to ensure that we see this through!"

VP, Americas Solution Architects

MTS 423: Effective Time Management

Your calendar reflects your priorities. But, more often than not, your calendar reflects the priorities of others. This course helps to match the SE leader's calendar against their priorities using the 3+1 framework together with the team and individual brand statements. We also introduce DOG theory (Distractions, Objectives, and Gains) as a filter on top of day-to-day activities.

"I am a convert. I will now take a few minutes every week and retrospectively examine my calendar AND look ahead to the next weeks activities."

Customer Engineer Manager, Nordics

MTS 425: The Team Brand

This facilitated course helps SE Leadership to create a team brand by looking at Vision & Purpose, Stakeholders, Processes, and Deliverables. The intent is that if the team is spending time on activities outside of Core Processes and Deliverables or ignoring Primary Stakeholders, that may not be an optimal arrangement. We also build an initial Mission Statement if one does not exist.

This class is frequently paired with MTS 401 as an introductory half-day.

MTS 426: Reviewing And Streamlining SE Processes

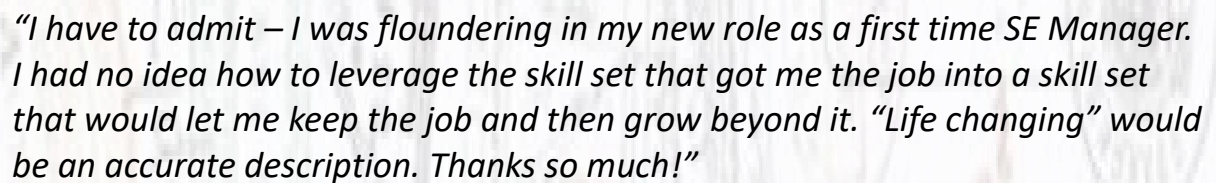
“We’ve always done it that way” is the automatic, unthinking response when challenging a process that does not seem to be the best fit. However, with changing business strategies, market dynamics, and shifting competitive challenges, focusing on the effectiveness of SE processes over repeating past practices becomes a critical element in your team’s success. This workshop creates a framework known as SCAMPER for the SE leader to review, analyze and (hopefully) improve existing processes within their organization or those that touch their organization.

MTS 427: Creating And Running The SE Quarterly Review

The SE team QBR is about more than deal status. Win/Loss analyses, new competitive strategies, new product/feature upgrades, customer value realization, and many more pressures all contribute to winning strategies. The answer to these pressures is rarely within the manager alone; they are within the team and cross-functional partners. This course teaches the SE leader how to initiate, plan and then facilitate a QBR (Quarterly Business Review) to focus on tactical and strategic SE operations. Requires MTS 425.

MTS 429: Technical Account Planning

This workshop covers comprehensive TAP (Technical Account Planning) as a follow-on to broader account planning. First, we inventory SE-led activities relevant to advance account plan goals, e.g., assessments, customer workshops, QBRs, and all traditional SE activities. Then, what are the customer-specific strategies necessary to map against these activities: improve customer time to value, broaden stakeholder and internal champions, create a trusted advisor environment, utilize cross-functional and SME teams, and optimize forecast accuracy? Finally, the workshop closes with SE Manager’s skills in conducting deal reviews (coaching for deals).



“I have to admit – I was floundering in my new role as a first time SE Manager. I had no idea how to leverage the skill set that got me the job into a skill set that would let me keep the job and then grow beyond it. “Life changing” would be an accurate description. Thanks so much!”

SE Manager, Europe

Rule 3 Courses: Serve And Delight Your Customers

MTS 431: Selling As (Or Being) An SE Manager

Now you are an SE Manager. Your company has promoted you; have you promoted yourself? How do you train yourself to not fall into one of the biggest traps of many SE Managers; becoming a SuperSE – doing the job others are to do or demanding them to be the SE you never were? What is your role now on a sales call, during internal strategy sessions, or when dealing with escalations? Through small group exercises, we determine the ground rules of the situation, your expectations, and those of the customer, the salesperson, other stakeholders, and the SE (by seniority level). This workshop establishes a reusable framework for SE Managers to behave in a more executive manner with all engagements.

MTS 435: The Executive Connection

As you move up the SE hierarchy, a more significant proportion of your internal and external interaction will be with executives. What do Executives want from SE Leaders? How do Executives think? What are their drivers? This course introduces an executive meeting framework helpful in planning for your engagement. This framework includes the basic principles of financial return on technology, research, the necessary components of an executive dialogue, and a strategy for looking at internal and external business drivers – all wrapped with several role plays and case studies.

MTS 439: Preparing For The Sales QBR

Every SE leader should have a seat at the table during the quarterly planning meetings. To be an active and informed participant, you must plan your key inputs and insights to represent your team and optimize the overall sales strategy. You must also prepare to advance your personal brand and be more than “The Techie Manager.” This course lays out a preparatory and participatory framework for the first-time QBR attendee and/or presenter.

Feedback And Measurement

One consistent feedback mechanism during each session is that of Monday Morning Behaviour. We encourage each participant to think and document how they will behave differently when back in their home office the following Monday¹. We suggest (subject to fears of micromanagement) that the list is then reviewed by their immediate manager and incorporated into an individual action plan.

Frequently within our workshops, our facilitators comment that we are simply beginning the dialogue on any particular topic. This dialogue is to be continued by managers within an environment established by their leadership.

Delivery Options

We have facilitators throughout the Americas, Europe, India, Singapore, Japan, Korea, China, and Australia.

Workshop size depends upon the content and the client's requirements. Typical workshops vary from 6 to 20 attendees.

Contact Information

To learn more and to obtain more detailed curriculum details and investment options, contact us at info@masteringtechnicalsales.com

¹ Or Sunday – depending upon your location.