



Mastering Technical Sales
3030 Grand Bay Blvd #333
Longboat Key FL 34228
Phone +1-215-431-1552
John@masteringtechnicalsales.com
www.masteringtechnicalsales.com
John Care, Managing Director

Pick Up The Phone (Or Start Up The Video)!

Why Digital Is Not The Same As Live Conversation

*“So then I sent the rep an email asking for more information”
“I’m still waiting for support to respond to my status update request”*

As Pre Sales Engineers, we are all very comfortable with technology and adapting to change. One of the biggest changes in communications over the past 20 years has been the use of email. It has been a tremendous productivity booster – no question about it. Yet – sometimes email gets in the way of our internal communications; it gets in the way of our customer relationships, and ultimately gets in the way of closing the deal.

The next generation Sales Engineer is predominantly digital. The methods by which we communicate internally and externally now include texts, tweets, Slack, email, social network updates, wikis, SharePoint, video posts and many other alternate streams. I am going to make a case that whether you are 25 or 55, there comes a time when you just have to pick up the phone and have a live conversation rather than fire off another digital demand or email enquiry.

The Pain Of Email

A while back I worked on two “take-home” consulting engagements. Both involve supposedly broken internal processes that were affecting the effectiveness of presales and ultimately the win-rate of the entire sales force. (You know something is so badly broken when everyone involved is trying to affix the blame rather than fix the problem.) The first case involved a company with poor Discovery habits, the second with a presales team spending 35% of their time on post-sales support. In both cases – email and Slack/Chatter was to blame, as well as the people who relied upon it as their communication mechanism.

One of the first articles I ever wrote was [“Are You Really Paid To Read 200 Emails A Day?”](#) It’s still a valid question!!

So This Is When You Pick Up The Phone

1. **Email Isn’t Working.** You have sent an email to the rep asking for his Discovery notes, or to a support manager asking for an update on a customer case. When you get nothing back, or an

incomplete response – then it is time to pick up the phone. If you continue the email approach, you are encouraging bad behavior. As a side note, unless a rep is emailing me a customer document, I always, **always** want to talk to her. It is nice that you may have an online SE resource request system, a fill-in-the-blanks discovery form or a reliance on your SFA system for customer data – but it can never take the place of a brief “interrogation” with sales.

2. **You Need It NOW.** SE’s are unique in that they have two customer constituencies. There are the customers who pay your company money, and there are the salespeople who persuade those customers to spend the money. Both are important and both can make or break your career. To keep them happy you need to demonstrate a sense of urgency. I am amazed at hearing SE’s say *“I already texted/emailed corporate for that information.”* Then they wait patiently. If you need it now (and you love your job), go get it. Be nice, but go get it. If you are in the office go sit on someone’s desk and make it personal.
3. **Emotion v Fact.** It is difficult to get the Emotional Quotient of an email correct. When relaying purely factual information – it’s great. We have all written, and received, one of those emails that were completely misinterpreted by one of the recipients. When you need to rely on a smiley face or a “LOL” to clarify the tone of your message, it is more an indictment of your writing skills. Words read from a digital screen carry no emotion, a voice conversation allows you to read and adjust based on what you hear (or do not hear 😊) on the other end of the phone.

<When you do receive one of those flaming emails that upset you take this course of action. First take your hands off the keyboard, and then go do something else for at least 30 minutes. Next respond back (especially if there is a big cc: list) with a *“Steve – I don’t think this is an appropriate conversation to continue across email, I’m going to pick up the phone and call you”* Then pause again, now call Steve!>

4. **The 3-Ping Rule.** Back when I was a CIO, I once looked over the shoulder of one of my developers and discovered an email chain of 127 “re: your requested coding change” messages. The developer and the QA analyst were one floor and 45 seconds apart. You can imagine my reaction. As a rule, once a conversation has gone back and forwards 3 times, it’s time to pick up the phone as the communication is getting too complex and there is too much room for error.

Your email :	“What version of the product are you running?”
Customer:	“Version 6 I think”
Your email:	“Is that 6.0 or 6.1?”
Customer:	“The latest version”
Your email:	“What patch levels?”

STOP! PICK UP THE PHONE. YOU HAVE NO IDEA WHAT ASSUMPTIONS ARE BEING MADE BY BOTH OF YOU!

5. **Becoming A Trusted Advisor.** Building a customer relationship is tough enough, doing it over email is harder still. I always try to get my customers on the phone very early in the relationship and use a mix of phone and email. Skype / Zoom (or a technical equivalent) is wonderful for all customers. Try sending your customer some information and then request a time to follow-up with them on the video / phone. You can drive trust by increasing Credibility, Reliability and Intimacy – email can only help you with the first two of those factors.
6. **Building Internal Relationships.** In order to get things done inside your company you need to rely on other people in other departments. Try using the phone with some of these people – particularly when they help you. Whenever I wanted to thank someone in tech support or an engineer who had fixed a time-critical bug for a POC I would always call them and say thanks – and then tell them I'd send an email thank-you to them and their boss. Worked wonders! On those occasions when I visited corporate, I'd always find their cube and physically introduce myself too. If they helped close a deal I'd get them a copy of the PO.
7. **CYA is DOA.** Many internal emails are sent as political protection and cover. However – there are times when Covering Your A\$\$ is Dead On Arrival. You may need to have a conversation that is off-the-record – such as the one with “Steve” from point #3. There are words you can say that should never reach a keyboard.
8. **When You Are Asked To Call.** Michael Hess (CBS News) defines this as “mixing the media”. For example, someone calls you, leaves a message and says *‘please call me back’*. Instead, you email or text back your response like *“got your message, what’s up?”* If you are in the middle of a meeting or about to take off on a plane and are sneaking message out then OK, but otherwise Phone returns Phone!

Summary

So if you are frustrated in some internal process (or even in a customer communication) see if email is in the communication chain. If it is – ask yourself what would happen if you picked up the phone rather than send another email? If tech like Slack or Chatter is in the chain, do the benefits of collaboration outweigh the downside of impersonal communications?

Maybe things would magically get better.

In my two engagements, the discovery rate doubled and presentation standards have improved dramatically in just three weeks for one customer. The other customer reports that post-sales time has decreased from 35% to a still-high 22% and is trending downwards. It works.

“If E-mail had been around before the telephone was invented people would have said "hey, forget e-mail - with this new telephone invention I can actually talk to people”

Anon

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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