

The Sales Engineer Manager's Handbook

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Mastering Technical Sales



SALES ENGINEER LEADERSHIP CURRICULUM

Mastering Technical Sales

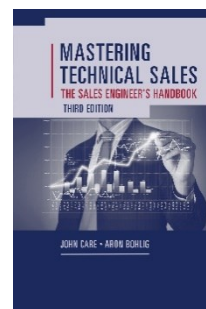
2022 SE Leadership Curriculum Listing

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2022-23 SE Leadership Workshops – Outline Curriculum

Here 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.

We build our Sales Engineering Leadership workshops around the dual frameworks of the three fundamental role-specific imperatives for presales leadership and the five-step SE lifecycle. Each management workshop is structured for either physical face-to-face or virtual delivery upon demand. 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 fundamental skill – Rule 0:

Know Yourself (Manage Your Own Time)

Workshop Listing

| Workshop | |
|-------------|------------------------------------------------------|
| MTS 401 | Metrics To Run Sales Engineering As A Business |
| MTS 402 | The Operational Sales Engineering Manager |
| MTS 403 | Coaching: Demos, Technology and Cultural Discussions |
| MTS 405 | Develop And Serve Your People |
| MTS 407 | The Trusted Sales Engineer Manager |
| MTS 428 | Not Everyone Is Like You (Manager Version) |
| MTS 420-429 | Custom Built Workshops For Our Clients |

The MTS 42x series allows our clients to mix-and-match individual topics from the standard classes into a customized workshop designed for a larger global rollout.

MTS 401v Workshop – Metrics To Run Sales Engineering As A Business

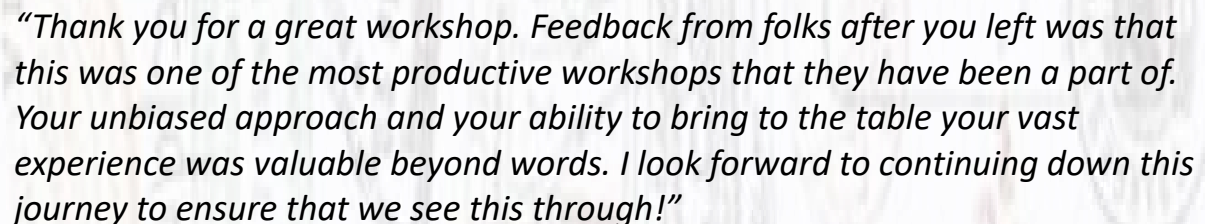
(1 or 2 Days)

This facilitated workshop 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 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?



"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 428v – Not Everyone Is Like You (Manager Version)

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 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 your team's customer interactions more memorable, interesting, and compelling.

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

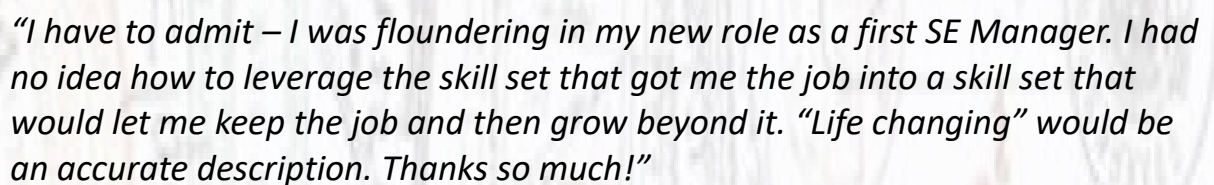
MTS 402v – The Operational Sales Engineering Manager

(Varies 1-2 Days)

Specialized training for the Presales 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 they should change to progress further in their current role.
2. Create a positive understanding and definition of what a SE leader does within the context of the 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 fundamental imperatives + RADAR
4. Relating the managerial role to customer and sales-facing situations
5. Generating, understanding, and 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.
8. To become an active and valuable part of the Sales QBR process



“I have to admit – I was floundering in my new role as a first 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

MTS 403v – Coaching: Demos, Technology and Cultural Discussions

(1-2 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, we present a methodology for managers to assess how their SE’s 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 you are not present. Finally, managers take part in role-plays, exercises, and a live format so that others may practice their feedback techniques.

The two-day delivery of this workshop explores how coaching can be more about the coach as it is about those managers coach. In this expanded workshop, we explore how to establish a coaching culture, beginning with Rule 0, to include processes that drive toward making coaching stick.

“Feedback is a gift. Except that was not the way my senior SE’s interpreted it coming from their sales partners or from me. I’ve now been using these techniques for several months and it has made a major difference to both our tactical sales calls and to my relationship with my team.”

Senior SE Manager, Americas

MTS 405v – Develop and Serve Your People

(1.5 – 2 Days)

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

As a result of attending this class:

1. Technical Managers will grasp 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.
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 drive 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.

*“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. The **Cost of keeping a poor SE** exercise was incredibly insightful. Wonderful.”*
SE Director, Singapore

MTS 407v – The Trusted Manager

(1 Day)

This workshop takes the external customer-facing components of MTS307 – The Trusted Advisor Sales Engineer and pivots them for internal use. This is a stand-alone module within the two-day workshop “Creating a Culture of Coaching.” The focus is on the practical application of the critical elements of being an effective coach: Trust. Why Trust is required to execute the role of a Trusted Manager with their employees and cross-functional colleagues and how to assess and build trust within new and existing team members.

As a result of attending this class:

1. The Manager will **build and define** their personal **definition** of what a Trusted Advisor is and what a Trusted Advisor does in the context of their job role and their function.
2. The Manager will learn the **five component factors of the Trust Equation** and how they relate to current and future behaviours.
3. The Management Team will **create their own Trust scorecard** and apply that system to a series of business relationships
4. The Manager will **apply the learning through a series of role-plays**, small and table-sized exercises, and real-life case studies.

“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

Feedback And Measurement

One consistent feedback mechanism during each session is that of Monday Morning Behaviour. We encourage each participant to think and then 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.

Delivery Options

In addition to standard physical classroom-style workshops, we also designed most of our workshops to be delivered virtually as a series of 2 x 90 minutes modules. For a classic 1-day class, we recommend having 2 modules on Day 1 and then the second set of 2 modules on a proximate day. Our standard v-delivery mechanism is Zoom. However, we are fluent in most other systems.

We have facilitators located 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.