Appendix 4 – Book Club Questions

Many clients form book clubs to dive into the content and share best practices. Sharing and discussing these topics with your peers is a fabulous way to learn from others and discover some of your potential blind spots. David Maloof, Group Vice President of Presales at Salesforce.com, kindly donated the following questions.

Section 0: Manage Yourself

Topic 1: Time Management

Since the start of the Covid-19 pandemic, calendars have become even more crowded without the physical separation of work, home and travel. What are some things you are doing yourself or have implemented with your teams to remove “distractions” and make the boat go faster? (as defined on pages 11-15)

Topic 2: What Could Possibly Go Wrong?

We've all stumbled with "The Seven Deadly Sins" outlined on pages 11-20 but do you agree that these are the seven biggest traps that we fall into as presales leaders? What's missing from the list? Which of the seven do you struggle with most frequently, and how have you overcome some of the challenges that they present?

Topic 3: The Art Of Saying No

Presales as a profession evolved from individuals who said "yes" to solving difficult problems that no one else would touch, and that mindset is part of our DNA. But, in today's world of resource constraints, have you found yourself using the techniques mentioned by the authors on pages 38-42? Which of them has worked for you, which ones haven't, and have you and your teams used other mechanisms for saying "no" effectively?

Topic 4: Strategy

As the authors mention, it is likely that "you are the only person who is thinking strategically about your small part of the SE world." Reference pages 44-49 if needed and have an open discussion around how you strategically plan for your team's future, how you get others in the business to buy into that vision and any tools/templates/techniques that you found helpful the way.

Section 1: Develop And Serve Your People

Topic 1: Recruit

Early in this section (pages 51-52), the author stresses that attempting to fully staff an organization with existing SEs is an expensive and losing proposition - suggesting that emphasis needs to be placed on non-traditional hiring. However, later in the section (page 71), he lists the many benefits of hiring top performers. How do you reconcile the different approaches? What successes or challenges have you found with "non-traditional" hiring into the SE role?

Topic 2: Attract (and Reward)

How often have you heard someone on your team say, "We (the SEs) do all the work, and sales gets all the rewards"? On page 92, the author outlines some inherent differences in how AEs and SEs are compensated. And it's true - the sales teams often have uncapped commission potential, are eligible for spiffs/contests that the SEs are not, and can participate in a more comprehensive reward system, including club trips and the like. So how do you respond to this question when asked? What other ways have you found to attract, reward, recognize and incentivize your teams?

Topic 3: Develop

Chapter 16, starting on page 100, is all about the skills necessary to be successful in the SE role spanning the areas of technical proficiency, "effectiveness," and leadership. While ongoing development should always be a priority, it is often difficult to quantify the impact and secure funding for enablement initiatives. So, in what ways does your company invest in continuous SE development, and how do you supplement it to help your teams maximize their potential and achieve their long-term goals?

Topic 4: Advance and Retain

These topics are discussed throughout the entire section, but as the author mentions on page 58, it's a common mistake that many of us make to neglect retention until it becomes an issue. With an increase in the number of SE roles available and easier access to those roles through things like LinkedIn and the Presales Collective, how are you ensuring that your team members have room to continue to advance?

Section 2: Run Presales As A Business

Topic 1: Define the Team

Chapter 20 is all about defining who your team is and what they do. Have you taken your team through a "visioning" session or something similar where you defined your mission, what you do, what you don't do, etc? What was that process like, and what was the outcome? If you haven't gone through this exercise with your team, do you think it would be worthwhile to do so, and how would you go about it?

Topic 2: Measure What You Do

In chapter 20, the authors discuss the four areas to measure: Financial, Learning & Growth, Internal Processes, and Customer. What metrics do you currently use to run your business, and do they align with what the authors outline? What do you wish you could measure but don't currently have the ability to measure?

Topic 3: Understand Your Business

Pages 143 to 145 outline the "Top 10 Things Every SE Manager Should Know." Is this list applicable to your business? Are there things you would add or remove? If they are relevant, how well are you utilizing them?

Topic 4: Inform (the rest of) the Business

Chapter 23 is all about the QBR, but it's really about understanding the larger business and giving the larger business insight into your business (that's a lot of business…). Is your SE org currently involved in sales QBRs? If so, at what level (Ics, Managers, Director+)? Do you have separate SE QBRs? What do you cover (or what would you like to cover) in each type?

Section 3: Serve Your Customers

Topic 1: Handling, Working, or Partnering with Sales

The premise of chapter 30 is that "your success and happiness as a [first line] SE manager is directly proportional to the quality of the relationship with your [first line] sales partner." Do you find this to be true? Which of the three headings best describes your interactions with your sales counterparts, and how do you ensure consistent, positive outcomes from your relationship?

Topic 2: The Actual Customers: Why are You in the Room?

As an SE leader, how often are you getting in front of customers? For example, do you attend customer meetings to provide domain expertise, executive alignment, or "to make the SE nervous," as mentioned in chapter 31?

Topic 3: Partners: Noise or Necessity?

On page 176, the authors list several "WIIFM"s that an SE leader can experience due to maintaining stable relationships with partners. Do you have a defined strategy that you follow to maximize the benefits that you and your partners receive? How effective has that strategy been, and what changes (if any) would you make after reading the chapter?

Topic 4: Cross (Dys)functional Teams

The author mentions a number of internal teams that you may regularly interact with, from professional and shared services to product management and specialist overlays. What methods have you found to be most effective when working across teams? Are they widely accepted best practices or unique to each relationship?