



Vision-Driven Pre-Sales Training Proposal

Goal for the four hours session

Spawn new ideas in the team that motivates them to think differently and help them to create snippets of specialised content they can continue to groom.

Detailed Agenda Suggestion

Session format: Presentation and open discussions; enough time for questions and involvement of the audience

Each participating Pre-Sales Consultant should have an opportunity in mind that he is currently working with an wants to use it for the exercises.

Module 1 _ Mindset

Focus is on how to think about the Pre-Sales Consultant job. What are paradigms I can use to make decisions when times are rough?

- A Vision, gathered through **Storytelling!**
- A reason for the Pre-Sales Consultant to act at all; **your why**
- A differentiation between **urgent and important**
- An understanding that the Pre-Sales Consultant is **not needed on every deal**
- The commitment that **Pre-Sales Consultants only play to win**
- An understanding that **leading with the solution** can be **counter productive**
- The understanding that **Give and Take** in a deal is crucial (strive for Win-Win)
- The agreement to only go for customers that **look for partners and not suppliers**
- That the Pre-Sales Consultant **acts as if she had no boss**
- **Creativity** instead of Process
- The gratefulness to **enjoy a fulfilling job**

Exercise

1. Use Storytelling and the given framework to create a vision for your customer.
2. What is your why?



Module 2 _ Preparation

This module focuses on preparing for a client. It focuses on the topics that Pre-Sales Consultants sometimes avoid by rushing into their demo comfort zone.

- Desk Research (hell no, I need to prepare a demo! This is for AEs!)
 - Your customer's big THREE
 - The Chevron Slide to visualize the journey
 - The hero's goal – a provocative point of view (pPoV)
- Meeting preparation
 - Visualize your story on slides
 - Position yourself as the Guide, not the hero
 - How to position your product
- How to identify allies
- Finding the customer vision toolbox
 - Idea storming & idea sex
 - Press release from the future
 - System Thinking
 - A day in the Life ...

Exercise

1. Idea Sex
2. Press Release from the future

Module 3 _ Qualification

Module three is all about qualification as this is not only an Account Executive's job. It is crucial that a Pre-Sales Consultant qualifies and justifies her time investments with opportunities – to make herself and the company successful.

- Mutual understanding
- Vision Match
- Need & Urgency
- Win-Win & Give2Get
- Technical Fit
- Problem vs. Solution Space
- Budget
- Sequence of Events
- Flags
- Questions to the AE
- Go / No-Go Meeting

Exercise

1. Open discussions on the topics itself



Module 4 _ Value Proof

Module four dives into specific areas of value proofs. Especially how to show value without thinking about technical or product future is a focus of that module.

- Reframe
- RfXs
- PoCs
- Proof of Value
- Anecdotes
- Comparisons

Exercise

1. Come up with three anecdotes
2. Come up with three comparisons