7 BEST PRACTICES FOR SUCCESSFUL PRESALES EVALUATIONS

Presales teams play a critical role in closing deals: You can't get the deal win without the technical win. While there are many variations of presales teams (titles include sales engineer, solutions engineer, solutions architect, solutions consultant, application engineer) and many types of evaluations (POC (proof of concept), POV (proof of value), managed trials, self-guided trials, demo environments), follow these seven best practices for managing your presales evaluations and you will boost your win rates and set up your post-sales teams for success.

#1 ➔ UNDERSTAND THE REASONS WHY, NOT JUST THE FEATURE LIST

Customers will often start off an evaluation by giving you a long list of features your product needs to have or requirements that your product needs to satisfy.

While this information is important to know, start the evaluation process by making sure that you clearly understand your customer's motivation for searching for a product. Ask about the business problems that your customer is trying to solve, the reasons why they have these problems, and the expected benefits if you can solve these problems.

Understand your customer's real motivation so that you can design the best solution for them, which may be very different than the solution that they originally had in mind.

Do not sell 'features'. Offer solutions to their problems.

#2 ➔ HAVE A PLAN TO GET THE TECHNICAL WIN

Now that you know you know the 'reasons why', create a formal evaluation plan that will showcase your proposed solution and get your customer's buy-in to follow the plan to completion.

The evaluation plan aligns you and your customer on the use cases that will be tested and the definitions of success.

Creating an evaluation plan can be challenging:

1. Customers may not know what their use cases should be.
2. Customers do not always know how to test their use cases.
3. Customer may be busy with their regular job activities and may not have time to figure out the best way to test your product.

Show your customer that you are experienced and value their time by recommending a list of use cases that will demonstrate how your product solves their business problems.

Your evaluation plans should lead customers to test the most valuable features of your product.

If you find yourself following the same or similar evaluation plans over and over, create standardized templates that you re-use with new customers. Every customer is little different so modify the template as needed when using it with each customer.

A well-designed evaluation plan brings your evaluation to a logical conclusion as quickly as possible with demonstrated success. Congratulations! This is the very definition of the technical win.

#3 ➔ CAPTURE THE DETAILS OF THE EVALUATION AND TRACK MEETINGS AND ACTIVITIES

Keeping track of all the details of an evaluation is difficult, but important.

There are key details about a customer's business processes, IT environment, etc. that are critical for you to know in order to support their evaluation. Capture these details up front as early as you can during the discovery process or early phases of the evaluation.

Certain details should be tracked in a systematic way so that you quickly can identify trends across your evaluations, for example, the most common operating system across deals that you've won or the most common database in use across deals that you've lost.

Take notes in every meeting, whether internal with your team or external with your customer. Meeting notes are the ultimate refresher on where you are in the evaluation. Review your notes regularly and show your customer that you remember everything about their evaluation.

You will build confidence quickly when your customers see that you are engaged in their evaluation. Asking customers for the same details over and over kills your credibility and tells your customers that they are not important to you.

Customers know that their presales experience is a predictor of their post-sales experience. Boost your chances of winning the deal by Impressing your customer with a high degree of engagement and demonstrated knowledge about their needs.

#3 ➔ BONUS RESULTS

Your evaluation notes improve teamwork and collaboration within your presales team as peers can come up to speed quickly on the status in the evaluation if they have to cover a meeting or take over a deal.

Your evaluation notes also are very useful during the post-sales handoff. Your customer success and support teams want to know how you got the sale and anything else that might be left hanging during that handoff. Your customer really will appreciate that the fact that they do not have to start with your post-sales team.

#4 ➔ WHEN YOU SAY YOU WILL DO SOMETHING, DO IT, AND DO IT QUICKLY

Track your action items so that you remember to do what you promised to do. It's easy to be on a call and say "Yes, I will send our integration guide." or "I'll check with R&D and get back to you..." and then quickly forget as soon as you hang up.

This is true whether you are juggling 20+ deals at the same time or just a few very complex POCs.

Either way, remember that this evaluation is important to your customer. They will remember what you tell them, but you might not. Quick responses and follow-through show that you are engaged in the evaluation.

Do not make the customer have to follow up with you to get a response or check if you completed an activity. If they have to ask, you took too long.

#5 ➔ CAPTURE FEATURE REQUESTS AND QUICKLY PASS THEM TO YOUR PRODUCT TEAM

The one question that every presales team knows a customer will ask multiple times throughout the evaluation is: "Can your product do *XYZ*?" Some of these features requests are 'must haves' or you lose the deal, while others are simply 'nice to have'.

Capture these requests as you learn about them, and dig deeper to understand the rationale for the request, such as the underlying business problem that this feature would solve and the expected impact on your customer's business.

Pass this information to your product teams so that they can compare what customers are asking for with their current product roadmap. These comparisons are critical to ensuring product-market fit over time.

#5 ➔ BONUS RESULTS

No company wants to lose deal after deal because of a missing feature that could easily be added. When your product teams are kept up to date on what prospects are actually asking for, they might be able to fast-track certain features into production before you lose the next one.

#6 ➔ CHECK IN AT REGULAR INTERVALS AND OFFER YOUR ASSISTANCE

Asking your customer if they need help is a great way to engage with them. They will feel more compelled to respond if you are offering genuine help rather than only trying to get the information that you need or trying to sell them on your product. Engaged customers are most likely to close.

For a variety of reasons, customers do not always let you know when there are problems with their evaluation. By checking in with them, you give your customer an easy opportunity to report any issues that they are having or feature requests that will roadblock the deal.

Your evaluations can hang open if you don't fix these issues or have a path for a feature. Resolve issues quickly to increase your chance of a successful evaluation.

#7 ➔ ENSURE A SEAMLESS TRANSITION TO POST-SALES

Many companies struggle with the transition from presales to post-sales. A common complaint is that customers feel that they are starting over from scratch with a new team and this degrades the overall customer experience.

By following these best practices, you have everything that your post-sales team needs to avoid this complaint and improve the customer experience:

- A record of the customer's evaluation plan and the results
- A record of the key details and attributes about the customer engagement
- A record of all internal and external meetings and what happened
- A record of the key action items that were completed
- A record of all feature requests
- A track record of helpful, positive, and responsive engagement

OVERALL ➔ BONUS RESULTS

With these best practices, you directly increase the chance of winning deals and setting up your customer as well as your post-sales team for success.

Following these best practices also will make your marketing team love you because:

- Happy customers are more willing to talk about their positive presales and post-sales experiences on reference calls with future customers.
- Happy customers increase your 'word of mouth' lead flow because they talk to their peers about positive vendor experiences. Personal endorsements can get your company on the list for new vendor searches

