

THE 4 DIMENSIONS OF TECHNICAL FIT ANALYSIS

Best-in-class presales teams determine whether a deal is a good technical fit or a bad technical fit as early in the sales cycle as possible. This classification guides presales time and effort investments in the deal. You will allocate less time and effort to deals with worst technical fits in order to allocate more time and effort to deal with better technical fits. Smart resource allocation is a hallmark of a well-run presales organizations. There are four dimensions of Technical Fit Analysis.

#1 → TECHNICAL ATTRIBUTES

WHAT IS IT?

Technical Attributes are the key technical details that your presales team needs to know in order to interact effectively with a prospect. Your presales team uses Technical Attributes to determine 1) the applicability of your offering and 2) which solutions to recommend.

For example, if your application only works on AWS, then the hosting provider that a prospect uses should be one of your Technical Attributes. Or, if you have different offerings that work with MySQL vs. MariaDB vs. some other database, then the database that a prospect uses should be a Technical Attribute.

WHERE DO I GET IT?

Technical Attributes are captured during qualification and initial discovery by your sales reps or during technical discovery by your presales team. Whether they are captured by your sales reps in your CRM or by your presales team in your presales platform, bi-directional data syncing between your CRM and your presales platform ensures both teams stay up to date and have full visibility.

HOW DO I USE IT?

Your Technical Attribute data, in combination with your Technical Win/Loss data, can be analyzed to create Technical Fit Profiles for both good and bad technical fits.

To keep it simple: Do you tend to lose when prospects are on hosting provider A or B? When they use database X or database Y? When they are on hosting provider A and use database Y?

PRO TIP: Track your Technical Win/Lose separate from your Deal Win/Loss. Technical Win Rate is always higher than Deal Win Rate and the differential is one of the primary metrics that presales leaders can use to help your company assess how well your product is meeting market needs, aka 'product market fit'.

The analysis gets complicated quickly when you have many Technical Attributes and many potential values, but your presales platform as well as BI solutions can do this analysis automatically. Expect to find multiple Good Technical Fit Profiles and multiple Bad Technical Fit Profiles.

Using your profiles, your presales team can make informed recommendations to their sales reps and presales leadership about how to proceed, or if to proceed, with any given deal early in the sales cycle.

PRO TIP: If a deal matches a Bad Technical Fit Profile and the reason is related to your product, your presales team should log a

Feature Request/Product Gap to inform your product team about the deal, the missing feature, and the associated revenue. Real data on deals and Dollars helps product managers prioritize development efforts to unblock at-risk deals and guide the roadmap for the future.

#2 → EVALUATION PLAN USE CASES

WHAT IS IT?

An Evaluation Plan Use Case represents a specific action that a prospect must be able to accomplish in your product. Use cases consists of:

- **Name:** A short description of the need,
- **Description:** A longer description of the need, often including specific steps, tasks, or activities as well as relevant documentation, diagrams, screen shots, or process maps,
- **Success Criteria:** A clear definition of 'success'.

WHERE DO I GET IT?

Some prospects provide a pre-defined list of Evaluation Plan Use Cases at some point in the sales cycle, either as a stand-alone document, as part of an RFI/RFP, or in prep for a POC/POV. The prospect often spends time before starting a vendor search to determine and document what they want to see in a product.

Other prospects have defined their business needs, but they have not yet translated them into a list of Evaluation Plan Use Cases. The prospect expects that you will collaborate with them to create the list.

In both cases, your presales team first should engage with the prospect to dig into their business challenges (e.g. work through the '5 Whys') and then make recommendations for a final list of Evaluation Plan Use Cases. This is true even when a prospect gives you their list. Your prospect does not know your offering like you do, and therefore your prospect does not know the best way to evaluate it. You may finish this process with a very different list of Evaluation Plan Use Cases than what the prospect started with.

PRO TIP: Be aware that sometimes a prospect is far along with a particular vendor by the time they contact you. They send you a list of Evaluation Plan Use Cases that was tailored for their preferred vendor, and they are engaging with you simply as a double-check that they are making the right decision with their preferred vendor. Good sales reps and sales engineers usually can identify this type of deal based on the prospect's level of engagement, level of transparency, or the Evaluation Plan Use Cases themselves.

HOW DO I USE IT?

For any given deal, whether or not you are able to satisfy the Success Criteria for the Evaluation Plan Use Cases gives you valuable information about technical fit. A Blocked Evaluation Plan Use Case means that you were not able to satisfy its Success Criteria. Blockers are bad, but they do not immediately indicate a bad technical fit or that you are headed to a technical loss.

When your presales team is alerted to Blocked Evaluation Plan Use Cases by your presales platform, they should immediately investigate the issue and determine whether or not it can be unblocked. If they shared any Evaluation Plan Use Cases with your prospect, for example using your presales platform's sharing feature or Customer Portal, your presales team can engage with your prospect directly to try and unblock the offending use cases.

A Blocker does not always represent a bad technical fit. Your prospect might be stuck, unsure how to use your product, and a little training gets them back on track. Other times some creative solutioning by your presales team can resolve the Blocker. If a product gap is the cause of the Blocker, your presales team can engage your product team to try and prioritize a fix during the sales cycle.

The more unresolvable Blockers a deal has, the worse the technical fit. Unresolvable Blockers does not equate automatically to a Technical

Loss. Other vendors may have more Blockers than you, and therefore you still get the Technical Win.

What is important is that as your presales team discovers each new Blocker, both resolvable and unresolvable, they make more informed recommendations to their sales reps and presales leadership about how to proceed, if to proceed any further, and how much effort to invest in remainder of the sales cycle.

PRO TIP: Like with Technical Attributes, when you have a Blocked Evaluation Plan Use Case due to missing capabilities in your product, your presales team should log a Feature Request/Product Gap to inform your product team about the deal, missing feature, and associated revenue.

#3 → FEATURE REQUESTS / PRODUCT GAPS

WHAT IS IT?

Throughout the sales cycle prospects ask if your product can do X, if it can do Y, and if it can do Z. They ask directly during technical discovery calls or during demos or indirectly through RFIs/RFPs or their Evaluation Plan Uses Cases. As technical experts, your presales team quickly responds “Yes!”, “No.” or some form of “It’s on the roadmap...”.

While best-in-class presales teams are giving those Yes/No/Roadmap responses, they also are logging the Feature Request/Product Gap in their presales platform, CRM, or product management solution.

WHERE DO I GET IT?

Feature Request/Product Gap logging has now become a standard part of modern presales processes and presales teams typically capture:

- Prospect/Opportunity name
- Details about the request/gap
- Status/Criticality
- Revenue

Presales platforms make it easy to capture feature requests/product gaps and ‘tag’ deals against them. If your presales platform is integrated with your product management solution, your presales team can search your product management solution for existing tickets for features in development or on the roadmap.

A feature request/product gap is often tagged in multiple deals, so your presales team should record any deal-specific variations. Product managers want details!

Your presales team should designate the Status/Criticality of the feature request/product gap with respect to the prospect, usually as Blocker, Future, or Nice-To-Have.

A Blocker indicates that the prospect will not buy unless you offer a solution before they select you and sign any agreements.

A Future indicates that the prospect is willing to buy today, but that you must commit to offering a solution at some point in the future; this is often called a 'presales commitment'.

A Nice-To-Have (NTH) indicates that the prospect does not require the feature now nor in the future, but, as its name states, it would be nice to have.

The Revenue associated with the deal is one of the most important data points to capture. If you are logging feature requests/product gaps in your presales platform, the revenue is pulled automatically from your CRM to remove the need for duplicate data entry by your presales team.

HOW DO I USE IT?

For any given deal, the list of associated feature requests/product gaps gives you valuable information about the technical fit.

The more Blockers and Futures a deal has, the worse the technical fit. You are unable to satisfy the prospect's technical requirements today. Blockers and Futures certainly can lose you the deal.

Identifying Blockers and Futures as early as you can in the sales cycle gives you more time to

collaborate with your product team to try and prioritize fixes and releases before you lose the deal.

While NTHs do not imply a bad technical fit, beware that you can still lose a deal if a competitor supports more NTHs than you do. Therefore, you still want to capture every NTH that your presales team hears.

Product Management is not an exact science, and data drives roadmap and priority decisions. Share the Feature Request/Product Gap data captured by your presales team with your product managers. They are desperate for real data and providing them with the names of prospects and the associated revenue enables them to compare the financial impacts of Blockers and Futures against other capabilities in the roadmap.

If your presales platform is integrated with your product management solution, then your product managers get real time updates every time your presales team tags a new prospect against an existing feature request/product gap as well as every time they create a new one.

In reverse, your presales team gets real-time updates every time your product management solution sets a release date and a release version, and eventually when the new feature is available.

Product teams can prioritize better their roadmap and development plans while presales

teams can engage better with their prospects during the sales cycle (as well as re-engaging Dead or Closed Lost deals once features have been released).

#4 → GUT INSTINCT

WHAT IS IT?

In addition to the other three dimensions which are data-focused, your presales team's gut instinct has a role in determining technical fit. It is a heuristic for everything not captured and not said.

WHERE DO I GET IT?

Your Technical Attributes will not capture every detail about a deal; the list would be too long to be practical.

Your Evaluation Plan Use Cases will not capture every use case your prospect needs in production; again the list would be too long to be practical.

Your Feature Requests/Product Gaps will not capture every request or gap that your prospect will ask for or encounter once they are live; they cannot think of everything during the sales cycle or they forget to ask or they just decide not to ask. Your presales team's gut instinct is a heuristic for everything not captured.

Your prospect will ask questions with a certain tone or use certain words. They will engage more or less than expected. They will be more or less specific in their questions. They will be more or less transparent in their discourse. And on and on.

Your presales team's gut instinct synthesizes all of this information and lack thereof.

HOW DO I USE IT?

Gut Instinct is a factor in Deal Sentiment. Most presales platforms include some form of Deal Sentiment, which allows the presales team to specify their 'feeling' or 'sentiment' about the deal in terms of subjective values such as Neutral, Encouraged, or Concerned.

You can consider having multiple forms of Presales Sentiment, for example a Technical Fit Sentiment which separates the presales team's feeling about technical fit from the overall Deal Sentiment.

Regardless of how gut instinct manifests in your presales platform or other applications, sometimes gut instinct turns out to be correct despite all other indicators pointing in the other direction.

PRO TIP: Your marketing team is desperate for Technical Fit data. They do not want to spend their time nor their budget on leads that are bad technical fits. However, marketing rarely gets this feedback from the sales and presales teams. Share your presales data, share your Technical Fit Profiles, or give marketing access to your presales platform. With marketing dialed in, you get more of the right leads and therefore more sales.