

Chapter One

Defining Sales Collaboration Roles

To understand soft skills for technology professionals, we need to understand the historical relationship between salespeople—the primary customer interface—and sales engineers (SE), technical experts working behind the scenes. This relationship prompts an intriguing question: Do salespeople and SEs maintain distinct roles from the past or wield equal influence when engaging with today's knowledgeable customers?

To answer this question, let's revisit a time 15 to 20 years ago when concepts like cybersecurity were less mainstream, the sales arena less intricate, and customers required less access or knowledge of product information. Typical products were anti viruses, firewalls, and email security solutions, in contrast to today's wide range of solutions, including Software-as-a-Service (SaaS) offerings.

Salespeople, often charismatic and relationship builders, closed deals through soft skills such as active listening and empathy, although some also possessed a basic understanding of technology. SEs operating behind the scenes relied upon their extensive product knowledge, yet they also possessed soft skills like effective communication and problem-solving. This division of labour proved effective when customer knowledge was less advanced and product offerings were straightforward.

While working at Herjavec Group, where additional features or services enhance product value, I noted the dynamics of customer interactions. Work would begin with a simple email agreement with minimal documentation. This approach mirrored the processes of the time; procurement requirements and compliance stipulations were concise.

SaaS and the sophistication of technology have created a complex approach to sales and procurement. The sales process now involves layers of approval, stringent compliance requirements, and a deeper understanding of procurement cycles—purchasing goods or services for business, where educated buyers require multiple approvals—and budgetary constraints.

The expanding role of the sales engineer

In response, SEs no longer confine themselves to technical explanations; they contribute to the narrative. This approach to presenting the product's value and benefits shows how technology can address specific customer challenges.

Today, SEs are engaged in customer-facing meetings and discussions. This new engagement requires them to develop additional soft skills and an understanding of market trends and procurement processes.

The evolving salesperson

Salespeople are more than relationship managers and negotiators. They are required to have a deeper technical understanding of their products. They must collaborate with their SEs and communicate with customers with technical acumen.

Today, they deal with complex procurement processes featuring multiple stages and compliance mandates. They have become skillful at procurement, often balancing their roles as experts and navigators. This adaptability is proof of their resilience and ability to adapt in the face of change.

This new synergy is paramount in this new era. The efficacy of an initiative often depends on the collaborative relationship between them. A harmonious relationship, underpinned by mutual respect and understanding of each other's strengths, is a formidable force in the sales arena.

Let's explore the three foundations of modern sales success: building solid partnerships, learning and adapting, and understanding customer perceptions.

1. Building strong partnerships

Regular communication, meetings, and joint planning sessions form the foundation of solid partnerships. This collaboration encompasses long-term customer relationship management and planning for sustained success. The value of this partnership is in its ability to leverage each role's unique strengths.

David Ghosh, a senior sales engineer with a decade of experience in enterprise sales, in an interview, said, "A strong, seasoned salesperson would do what is right 100 percent of the time," adding that "even though it may shrink the deal size or compromise the sale because when it goes back to the adage, you can shear a sheep many times. But skin it only once. If you do right by your customer, and you can make a profit, you can always shear that sheep and you always make a profit, but if you do, you must make sure you're doing what's right. If you do something wrong to the customer and cut them or skin the sheep, the customer will never trust you. You lose credibility. And that door will be closed for a year, ten years, or possibly forever."

2. Learning and adapting

Given rapid technological advancements and customer expectations, salespeople and SEs must stay current on product developments, industry shifts, and customer feedback.

Twenty years ago, it was common practice for customer data centers to handle all aspects of the proof of concept (PoC) process. Customers typically manage and conduct the testing, experimentation, or demonstration phases to validate a product's feasibility or effectiveness within their data centers. It shows a shift in how PoC is managed because of technical advancements such as the rise of cloud computing and SaaS solutions, which altered traditional methods. I remember driving with firewalls and other appliances, fully recognizing they cost more than my car. Today, most products are SaaS, and we can demo PoC and integrate them without leaving our desks.

3. Understanding customer Challenges

Sales teams must interpret data and feedback from diverse sources, customizing their approaches to address customer needs and challenges. Understanding the product and the customer facilitates pitching that aligns with a customer's requirements and concerns. This understanding sets a sales team apart and warrants customer satisfaction.

Each customer may have unique approval processes for various technologies, and the sales cycle could fluctuate based on compliance needs. I've been fortunate to be involved in deals requiring over 15 signatures. Our ability to read, educate, and learn from the customer made the deal a win-win.

Soft Skills 2.0 Spotlight

Chapter One spotlighted the modern interplay between salespeople, sales engineers and customers. Technical expertise and product knowledge are foundational, and incorporating soft skills—empathizing, listening, and communicating—into the procurement process is necessary. Let's move to the next chapter, embracing growth and improvement.