How to Succeed in Sales Engineering: Tips from a Seasoned Professional

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Agenda

• Basics
• Activity
• Strategy
• Accounts
• Account Identification
• Contact
• Network
• Styles
• Coach
• Investigate
• Resources
• Tools
• Database
• Funnel
• Remember You
• Price and Competition
• Etc.
Basics

• Confidence
  – Know your Products and Customers
  – Speak with Authority

• Be Prepared
  – Elevator Speech
  – Review Cards

• Comfortable
  – “Where else can I get paid to hang out with my friends?”
Basics

• Consultative
  – People Like to Buy, but do not Like to be Sold
  – Explain, Suggest

• Honesty/Ethics
  – Know Your Boundaries
  – Feel Comfortable to Say “I do not know.”
  – Never Make it up

• Stop Talking and Listen
  – You have 2 Ears and 1 Mouth
Basics

• Identify
• Meet
• Qualify
  – Technical Need
  – Funding
• Present
• Demonstrate
• Quote
• Follow Up
• Close
  – Remember to Ask for the Order!!!
Activity

• 4 Visits per Day
  – Long Introductory Meetings
  – Short Follow-Up Meetings
  – Presentations
  – Demonstrations

• 4 Days per Week

• One Office Day
Strategy

• Area
  – Zip Code Range
  – County
  – Office Park
• Accounts
• Technology
• Product
Accounts

• A Accounts
  – 3 to 6 Key Accounts
  – Account for 50% of Business
  – Visit Weekly to Monthly
  – Fully Understand Organization
  – Stay Abreast of Company News
Accounts

- **B Accounts**
  - Approximately 12 Major Accounts
  - Account for 30% of Business
  - Visit Monthly to Quarterly
  - Identify Major Departments, Personnel and Projects
Accounts

• C Accounts
  – Remaining Accounts in Territory
  – Account for 20% of Business
  – Make Contact
Account Identification

• Chain of Command
  – Key Technical Contact
  – Key Decision Maker
  – Key Purchasing Contact
  – Key Deal Breaker

• Know Who Will Support or Obstruct You
Contact

• Try to Be Exposed to All Your Customers Once per Month
• Visit
  – Lunch, Dinner, Entertainment
• Call
  – Try Different Days, Times
• E-Mail
• Mail
Network

- Family
- Friends
- Neighbors
- Community and Church Groups
- Your Children
- Professional Societies-IEEE
  - Meetings
  - Seminars
  - Conferences
- Current Customers
Styles

• Be Yourself
  – Find What Works for You

• Focus & Diversify
  – If It Works, Continue Doing It
  – Experiment with New Methods
  – When in a Slump, Rethink Your Methods
Coach

- Give and Take
- Favors
- Available for Visits in Emergency
- Information
- Try to Talk Away from Company
Investigate

- Web
- Find one Contact, then Network
- Identify Products, Programs and Projects
- Identify Departments
- Go into Lab
- Ask Who Else
- Never Assume
Resources

• Applications Engineers
• Account Managers
• Management
• Seminars
• Lunch & Learn
• Learn from Customer Presentations
Tools

• PC
  – Database
  – Office
• Smart Phone
  – Database
  – Contacts
  – Calendar
  – Text
• Tablet
  – I do not use-I still use paper
  – Data Sheets
  – Drop Box
• Car
  – Look successful, but not like a crook
  – Room for customers and equipment
Database

- Electronic Database
  - ACT
  - SalesForce
- Contact Information
- Organizational Information
- Technology Information
- Product Information
- Notes
Funnel (Forecast)

• Keep Track of Projects and Quotes
• Use for Follow Up
• Typically 20% to 67% Close
  – I use 20% (To book $2M you need to forecast $10M)
• Probability Percentages
  – 90%: Technically Approved, Funded and In Process
  – 75%: Technically Approved and Funded
  – 50%: Quoted and Likely to Occur
  – 25%: Quoted, but Outcome Unknown
  – 10%: Projected, but not Likely to Occur Soon
• Fill the Funnel
Remember You

• Business Cards
• Name Labels
• Tokens
  – Magnetic Business Cards
  – Personalized Pens
  – Personalized Note Pads
  – Calendars
• Visit, Call, E-Mail, Mail
Price and Competition

• Sell Features, Advantages and Benefits (FAB)
• Know Competitive Pricing
• Be Prepared
• Do not Engage in Negative Selling
• Understand the Application
• Highlight What you Offer Respective to the Requirement
• Do not Sell on Price
• Your Price is Based on Performance, Quality and Reliability
• Discount Now-Discount Forever
• Discount on Quantity
  – Blanket PO
  – Commitment Up-Front to Quantity
  – Extend Delivery
Etc.

• Follow Service Issues
• Make Something Good of Something Bad
• Capitalize on Success
• Learn from Mistakes
• Carry Forecast
• Follow Up Reminders in Database