

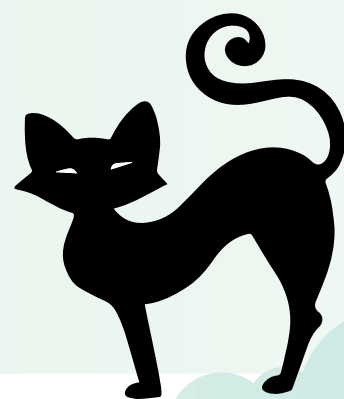
HAS THE DEMO DIED?



Four Experts Weigh-In On
The Past, Present And Future
Of Sales Engineering

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Introduction:

Sales Engineering Takes a New Form

The cover of this eBook poses the question, “Has the Demo Died?” The answer is a **definitive NO**. To be clear, the role of the [sales engineer](#) (SE) is evolving and also growing.

At CloudShare, we connected with the profession’s most revered consultants to probe the minds of these accomplished industry leaders.

The four interviews that follow offer meaningful insights about the role of the sales engineer and how [demos and proofs-of-concept](#) should—and should not—be handled.

You’ll find many common themes emerge regarding the future of the SE, the skills needed to excel in the profession, trends in technical sales, and above all, the need to adapt a consultative approach as a pathway to success.



We invite you to read and enjoy the insights here from four proven experts.



John Care

John is the managing director of [Mastering Technical Sales](#), a training and consulting company specializing in skills development of pre-sale engineers. He's the

author of *The Trusted Advisor Sales Engineer* and co-author of *Mastering Technical Sales: The Sales Engineer's Handbook*



Peter Cohan

Peter is the founder and principal of [GreatDemo!](#), which provides workshops, training, and coaching on demonstration skills for

software organizations. He's the author of *Great Demo! How To Create And Execute Stunning Software Demonstrations*.



Rich Chiarello

Rich is the president of [Above the Line](#) where he specializes in sales and management consulting. He's the co-author of *Selling Technology* *the Sandler Way: Finding Technical Solutions That Win Long-Term Business Relationships.*



Rob Falcone

Rob is director of sales engineering at [Guru](#). He's the author of *Just F*ing Demo: Tactics for Leading Kickass Product Demos.*

The Future of Technical Sales: An Interview with Expert John Care



*“It's no longer enough
to be deeply knowledgeable about
your product.”*

Do sales engineers have a future?

John: I bet my company on it. There's definitely a growing demand in the marketplace for sales engineers.

An interesting article in *Harvard Business Review* recently looked at which skills and jobs are most likely to be automated out of existence. If you look at sales—and particularly technical design and technology architecture—they're way down on the bottom of the list.

Why would there be a conversation about the demise of the sales engineer?

John: Well, the way that customers are buying technical stuff has certainly changed over the last 10 to 15 years. Customers go a considerable way through the sales cycle now before they start engaging with vendors.

There is still much for vendors to do. But if, as a sales rep, all you can do is “parrot” back what's on your website, you can question the [value of the job](#).

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I think it's about providing value and that's where the sales engineers excel. There's so much that they can do and so much value they can provide.

So, you propose a sales engineer should now focus on consulting, why?

John: That's what customers are demanding. It's no longer enough to be deeply knowledgeable about your product. You can't just turn up and recite speeds and feeds. You need to know how other companies use your solution and be able to communicate that knowledge.

I meet with many VPs of sales at large tech companies and the conversation almost always starts, "I have great technical sales engineers, but..." And after the but is, "I wish they just didn't dive-down into features at the first opportunity. I wish they took the time to understand what the

customers' business problems really are and link our technology portfolio back to the business." If there's one sentence that describes consultative selling for a sales engineer, that's it.

You're writing a book about technical sales management. Is the challenge of the sales manager to teach SEs how to be more consultative?

John: It's one of them. But also, the challenge is finding the right people for the job. A [sales engineer](#) requires a fairly unique blend of skills. You need to understand the technology and then be able to continually learn the technology. And, you have to be able to communicate that, so you need some interpersonal sales skills as well.

It's pretty difficult to find somebody who can put those two together in an effective way.

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Somebody who is consultative needs to develop listening skills and ask the right questions, right?

John: Absolutely. I believe you can judge the quality of a sales engineer not necessarily by the answers they give but by the questions they ask in the first place. That's a tough skill to acquire. That usually requires some training.

Fact or fiction: the lines between the sales engineer and the sales rep are blurring?

John: Fact. I believe the role of the salesperson hasn't changed significantly in the last 20 years in terms of what you do. Certainly, how you do it has changed, but very few new skills have been added to the role of the salesperson.

Yet the role of the sales engineer has. They're being asked to become more consultative, better communicators, able to get in front of CIOs, CFOs and COOs. So, the skill set is expanding rapidly.

SEs hate what they call "selling," which they equate with forecasting, negotiation and putting proposals together. But there is a middle area of customer relationships, making the executive connection, what companies call "land and expand." Quite often the SE is in a better position to do that than the salesperson.

I don't know if the roles are ever going to morph together but SEs are starting to handle more of that middle gray area. It's part of the push for this consultative selling again.

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How much has automation changed the game?

John: The ability to automate a good chunk of the RFP response—not just throwing in boilerplate responses to standard questions—is happening more and more.

A lot of times, as a rookie SE, one of your first tasks is to fill out a bunch of RFPs, which is a horrible thing to do. So, getting that automated, smoothing it over and touching it up—that's going to save tremendous amounts of time for many SE organizations.

The other part of automation is around demos. Right now, you can go to the website at many tech companies, check a few boxes and they will give you an "out of the box" demo.

I think the demo is going to start becoming more experiential, in that a potential customer will be able to come on a website, check a whole bunch of boxes, basically order from a menu, and see a [customized demonstration](#) based on exactly what they want to see.

That's going to take out of play what a number of inside sales engineers do. They'll then be pushed into the higher end in terms of architecture, larger deals and more complex demonstrations and presentations.

However, taking the low-end stuff out is quite a big deal because you can save a massive portion of sales engineering time by automating those two things.

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You've asked executives to reveal the skills they value most in a vendor's technical sales team. What answers did you get?

John: It's interesting. The execs came back with five main things...

The first one was: I want someone who understands my business. Don't make me teach you about it.

Second: someone who can design innovative solutions with my staff—not FOR my people but WITH my people.

Third: being able to communicate with me clearly and effectively.

Number four is someone who I can trust to do the right thing for my company, to be a trusted advisor.

And then number five is someone who has deep technical knowledge.

The data behind the results revealed that answers 1, 2, 3 and 4 had a very high correlation factor. 85% gave those answers.

Number 5, however, deep technical knowledge, came in at about 42%. I think that means deep technical knowledge is now simply table stakes.

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So, the bottom line is technical demonstrations have to evolve to meet the needs of both the sales engineer and the prospective buyer?

John: Absolutely. A properly timed demo (by the way, many occur too early in the sales process) is usually a key proof point for the customer. It's the sales engineer and associated team presenting to the customer with some interaction. A [proof-of-concept](#) is usually where the sales engineer will work directly with the customer onsite, or nowadays actually the customer

just downloads the software or uses it up in the cloud, and it's mainly a try and buy.

So, the logistics behind that, the strategy behind that has changed quite a bit. The faster you can set it up, the more contained you can make it, the easier it is to close the deal.

I have clients who tell me that if you can get a qualified customer to a proof-of-concept, the win rate is about five out of six. That's a pretty impressive conversion rate. Notice the caveat, it's a fully qualified customer.



The Power of Discovery Skills: An Interview with Expert Peter Cohan



“Well, we didn't really get to the most interesting stuff here because we ran out of time.”

What's changing for sales engineers going forward?

Peter: Is technology changing things? The answer is definitely yes. The vehicles through which one might present or view demos certainly have been changing—and perhaps changing rather dramatically—but the content of B2B enterprise [software demos](#) has changed very little.

And that's actually part of the problem. Vendors for the most part still feel that it is their job, and the pre-sales person is the vehicle, to tell the customer as much as possible about their offering in the

allotted time. And that continues to be the number one problem in the world of demos.

It becomes show-and-tell time?

Peter: That's pretty much what it is. A customer hits that button on a website that says, “show me a demo,” and eventually a pre-sales person is connected with the customer. The customer says something like, “I just want an overview” and the vendor says, “terrific, let's set up an hour call.”

In that call, typically done over the web, the first five to seven minutes are spent fumbling around with
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what I used to lovingly refer to as “the WebEx tax,” which is where people are downloading the latest version of WebEx or connecting. It’s followed by an introduction of the vendor’s team—but nothing about the customer. And it’s followed by a corporate overview presentation that consumes perhaps 10 to 15 minutes...

Followed by a product overview... Followed by the pre-sales person saying, “We’ve only got 30 minutes left and I’ve got a lot of material to cover, but I want this to be really interactive, so ask questions along the way.” And, of course, there’s no time for questions. And the pre-sales person at the end of the hour says something to the effect of, “Well, we didn’t really get to the most interesting stuff here because we ran out of time—but what did you think?”

What are the alternatives?

Peter: Alternative number one is to teach people to get to the point. Number two is to not beat people up with your corporate overview. Let’s face it, a customer would not accept an hour meeting if he or she had not vetted the vendor sufficiently.

The most important thing is to go back to the whole idea of trying to find a way to satisfy the customer’s request for a demo yet find a way to execute sufficient discovery to learn enough about the customer situation so that you can get to the point and present the customer with something that’s really meaningful. And here’s the big gasper: do it in 20 minutes.

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You wrote about the four stages of competency. What are they and how do they impact the sales engineers and the demos they deliver?

Peter: Have you ever met someone who didn't even know that they had a problem with respect to skills or knowledge whatsoever?

Stage one is what's known as *unconsciously incompetent*, meaning we don't know what we don't know. We're simply unaware that there are problems and hence it is impossible to make any changes.

Stage two is *consciously incompetent*, meaning you're aware of what you're doing or that you could be doing things differently but you're perhaps not able to affect the solution yet. In many cases this is where a lot of organizations are or individuals are when they go out to seek help to improve whatever business process or skill that they want to improve.

Stage three is *consciously competent*, meaning they now know some actions to take to actually improve their situation.

Stage four is *unconsciously competent*, which means we don't even think about it anymore, we just do the right thing. And I will comment that star performers, “eagles”, in sales and pre-sales are often in stage four. They don't know why they're doing what they're doing, they just execute.

Why do we raise this? Because far too many people in pre-sales have no clue that their demos could be better. In many cases they are pre-sales folks—SEs that have been doing demos for 5, 10, 15 years or longer—and they have no understanding that in fact they're boring the pants off their audiences, failing to achieve the desired end results. So that's the four stages and their impact on [pre-sales](#).

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What are discovery skills?

Peter: Very simply, discovery is the process of questioning and discussion between a vendor and customer, so that the vendor can provide a precise solution to a problem. That's the vendor perspective.

But there's a second element to discovery that most people don't think about, and that has to do with the customer feeling comfortable that the vendor has asked sufficient questions so that the vendor can actually propose a solution to the customer's problem. Those two perspectives can often be different.

Going back to your question, a fundamental question, what is discovery? In many organizations, "discovery" is what is commonly referred to as BANT, a set of four

simple questions along the lines of:

Does our prospect have a **b**udget?
Does this person have the **a**uthority to make the purchase?
Has the **n**eed been defined? Is there is a **t**imeline?

That's what most many people believe is discovery, but in fact that's just simple qualification. Discovery is going much deeper. It's not only recognizing that there is an iceberg with a bulk of its mass underwater, it is then asking the critical questions to understand the nature of that iceberg... how big it is, its composition, and on and on.

So that if you're looking to actually propose a solution, you're not simply trying to address the tip of the visible iceberg. You're trying to gain a much clearer understanding of what is hiding in the depths. How's that for a tortured analogy!

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Is it fair to say the job of the SE has become more consultative?

Peter: This goes back to exactly what we were talking about, the need to do discovery. If you have a product that takes an hour for an “overview demo,” that means you've likely got far more capabilities than any particular customer could possibly ever consume.

Since many studies show most customers consume only 20% of the offering, it suggests a good portion of the product is going to be of zero or little interest to the customer. So, it becomes incumbent upon the sales team, in this case, the pre-sales person, to become more consultative and to ask more questions before moving the mouse.



To Demo or Not to Demo: An Interview with Expert Rich Chiarello



*“The best demo
is one that’s never given.”*

Is the role of the sales engineer dying?

Rich: No. I would say it's probably becoming more important, especially considering the vast majority of the products being sold are software-as-a-service.

As an SE, I am now a higher sought-after talent. I'm going to have to do two things: I'm going to have to convince you—usually through a very brief demo that by entrusting the product into

your sphere it will perform what you want it to perform. But I also have to address all your ancillary worries about data protection and what could happen to other things in your system. I need to be able to articulate and convince you that you're putting yourself into good hands.

If you think about it, I now have two responsibilities: one, win product preference; two, convince you my solution will not damage the rest of your infrastructure.

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What are your thoughts on the evolution of the sales engineer role at large?

Rich: SEs need to be able to take technical capabilities and translate them into business savings or business opportunities.

The people who can do this well are sought after and paid the highest premium.

Your goal as an SE—being that next wave after the salesperson has done some preliminary qualification—is to do both a technical fit and a business fit and help the sales team understand who the people are we need to align with and get to.

All of buying is emotional, and unless I'm going to be able to position my product in front of the emotional buyer with a personal need to solve the problem, it will most likely end up in a no-decision.

Another theme that's coming through in these interviews is if you're going to thrive in the job you have to become more of a business consultant.

Rich: Correct. The system engineers that command the highest salary are the ones who succeed when the buying cycle requires a [proof-of-concept](#) at the end in order for the person to go forward. It's not a technical proof-of-concept as much as it is an outcome-based proof-of-concept.

You say, "The best demo is one that is never given." Can you explain?

Rich: If I have a brand-new product with no installed base, a valid prospect might want to see a demo or maybe even try the software because how do I know what you're selling even works?

But if I have a base of hundreds or thousands of users, if I'm rushing to do the demo, I'm trying to do what, explain to the customer that my software works even though I have hundreds of users?

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Many times, a customer says, "I've heard good things about your product, tell me how you would solve my problem." Usually, when you hear that, it's like a bell going off, Pavlov's dog, you're like let me show you what we can do. So, the best demo I say is the one you don't do, because what you're basically going to start out with is something like, "Our product does so many things, I wouldn't know what to show you first."

The SE should be saying, "Is it okay if I ask you a few questions? Let me find out what, if any, needs you have and then once we figure out what they are and how you would like to see that capability used, then I will be in a better position to talk about it or, if necessary, demo that feature to you."

Many times, what will happen is that in the conversation I will uncover something you really

need. The more you talk about it and the more I stress that it is costing you and your company money, and the more I discover you have a personal stake in solving the issue, the less your desire to actually see a demo before moving forward.

What you want is to get the buyer in the conversation talking about the problem. Sometimes that eliminates the demo and sometimes it constricts the demo to just the one or two features that the person has asked for. What you want to prevent is doing a demo for someone without knowing what is important to them. You run the risk of going through your features in alphabetical order, or what you think might be most important. Every time you show a feature to someone that doesn't need it, you bore them. You're getting closer and closer to them saying thanks a lot, I'll get back to you.

Engineering Your Audience to Death: An Interview with Expert Rob Falcone



“Deep knowledge leads to folks giving demos that are very overwhelming.”

You claim the role of the sales engineer is misunderstood. Why?

Rob: When I joined Guru, I got a lot of questions from folks in the early stages of their careers who didn't even know what a sales engineer did. They know what salespeople do, they know what engineers do, but they weren't really sure about this role that seemed to be a hybrid.

The reason why it's so misunderstood is that it is a different role, a very different role, based on the organization and their product and sales style. In some organizations, like

Guru, where the product that we develop and sell is a business-user solution, the role of the sales engineer is much different than other companies that have much more technical products.

If there are skills that make for an effective sales engineer across the board, what might they be?

Rob: Regardless of the degree of technical acumen that's required, sales engineers are definitely not pitchmen or women. They first have to really understand what a client or prospect is trying to achieve and then, and only then, →

can they deliver a solution designed to help the prospect or client understand how they can achieve what they need to with your specific product.

I think about it very much the same way I think about a doctor. A doctor first needs to ask the right questions of the patient to understand what the patient is feeling or struggling with so that they can come to a diagnosis and then prescribe a solution. Good sales engineers, regardless of whether they skew more sales or more engineer on that continuum, require the critical skill of discovery.

Do you see the sales engineering profession as a stepping stone to other areas inside of a software company or any technical company?

Rob: Yeah, it's an interesting role in the sense it does bring together so many skill sets: problem-solving, discovery, building consensus, presentation skills.

Because it does bring so many different skills together it can be a springboard into a number of other roles, from sales executive, to sales leader, to product manager, to engineer in some cases. And I've seen examples of each.

For me personally, I moved into it from client success where you really must understand how to use the product. And so that helped me unleash certain skills and talents that I didn't know I had. Then it also helped me to develop new ones that propelled me into a number of different sales roles, as you mentioned, from carrying a bag as a sales executive to leading an entire sales organization.

Now that I'm back in a sales engineering role, I feel like I'm even better because I've had those additional experiences that I garnered after first becoming a sales engineer.

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You must have some opinions about what makes for a good demo and a bad one. What leads some sales engineers to fumble with demos?

Rob: Yeah, I have exhibited this myself...

I knew the product inside and out and that can be a double-edged sword for sales engineers. You have the engineer side of the title, so that typically implies really deep knowledge of the technology or the product. What I found with many sales reps and sales engineers is that deep knowledge leads to folks giving demos that are very overwhelming, very feature-heavy.

You engineer your audience to death?

Rob: Exactly. I found what makes for a happy medium between the engineer and the sales side is presentation skills—the ability to be relevant for the audience and very directly aim at helping the audience understand how they can solve a specific problem or achieve a specific objective with your technology.

When you're doing a demo, are you slowing down or stopping to say, "Is this sinking in? Am I answering your questions?" Are you getting that kind of feedback from the customer?

Rob: Absolutely. The best demos are conversations. One of the pitfalls I found with the word "discovery" is that people sometimes will fall into the trap of thinking that you "do discovery" first and then do the demo second. What that ultimately leads to is a 15-minute interrogation and then a 15-minute dump of all the features in a 30-minute meeting.

What I found is there's a blend where the entire meeting can be a conversation with the product as a backdrop. Showing a feature and then asking a question about how that feature aligns with what the prospect is trying to achieve. That's the idea of a conversation with the product and the demo as a backdrop, as opposed to an interrogation or feature dump.

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Does that mean you go into a demo without knowing anything about the customer?

Rob: No, on the contrary. I'll do my research coming into the demo, but then I like to do what I call the 5-minute discovery by asking a few really well-thought questions so I can get just enough information to make the demo more relevant. Then, as I go through the demo, I weave in additional questions and conversation points that help it continue to evolve and get more relevant.

You're saying—as others have—the sales engineer is becoming more of a consultative job.

Rob: Exactly. It's not enough to have your standard "Here are the features and functionality... Let me show you all of them," especially as products become so much more advanced.

One product might do so many different things for so many different audiences. So, the role of the sales engineer is very much to understand what the prospect is trying to accomplish and then show those and only those specific features and functionalities.

Have you seen automation and technical stuff, remote presentations and all, change the game?

Rob: Yeah. And I'm biased but I think for the better. I think about things that I'm able to do at scale that weren't nearly as easy to do years ago. A really simple example is using Chorus as a solution. Whereas previously if I wanted to go back and review my notes, or if I wanted to go back and review my performance on a demo, it wasn't the easiest thing to do. Now with solutions like Chorus, I can have the recording and it's transcribed. AI is used to surface important insights to me which will help me get better at my next demo. Technology has really helped.

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What about having an interactive environment where you put the customer in a real-world scenario and he or she gets a very customized and hands-on demo?

Rob: Yes, the more realistic and relevant you can make any talk or any demo to the prospect, the better. To the extent that you can use actual data, real environments and get folks' hands on the product, absolutely.

With all this growth in automation and AI, do you think that the role of sales engineer is in danger?

Rob: I think the danger is a bit overblown. It's really about the sales engineer evolving. If advances in technology allow the users to get a more hands-on experience, then the sales representative can shift more into the role of helping them see the value and expand the usage to others within the organization. So, it will continue to become more consultative and that's a good thing.



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