



# Accelerating Software Sales

The Home Edition

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Your Guide to  
Maximizing Presales Productivity  
from Your Home Office





“How do you translate your energy to the audience when you’re remote?”

With Zoom there's a digital distance that makes it hard to share your energy and passion. To be frank, you look like everyone else. We're all in this little box and we're all staring at the exact same screen.

How do you create character and energy that's different than the last presales person that gave a demo?”



**Sam Pena**

VP, North America Presales, Pluralsight

# How's home (work) life treating you?

In one capacity or another, your job is to sell software. Doing so comes with a new challenge: you do it from home. However, the challenges you faced prior to “the new normal”—such as meeting quotas—remain. According to [IDC research](#), the top priorities for the demos and POCs you conduct also remain the same:

- Reduce sales cycle times
- Reduce the time and effort involved in setting up demos and POCs
- Limit or reduce IT infrastructure needs



## Can software sales professionals be equally successful working from home?

We spoke with a number of presales professionals (who you'll hear from throughout this eBook) about this question and got some interesting answers. Here's one:

“

I would say, yes, but with a new mindset. What I mean is we have to realize we are not connected person-to-person and building relationships. So, how do you keep it personalized in a digital world? The answers to that question will be the next frontier for presales. I think you can do it. You have to be very diligent, for one, and then, two, you have to have the right tools to make sure you're connecting with your customer and make sure they're successful in whatever goals they're looking to achieve.”

Owen McClave  
Manager of Solution Architecture, AWS

Recent research from LinkedIn's State of Sales report delivers a bit of reality check.

Note: the people in the survey were not limited strictly to software sales.

55%

Anticipate a decrease in pipeline.

60%

Anticipate a decrease in hitting quota

Travel's restricted and in-person meetings are limited

70%

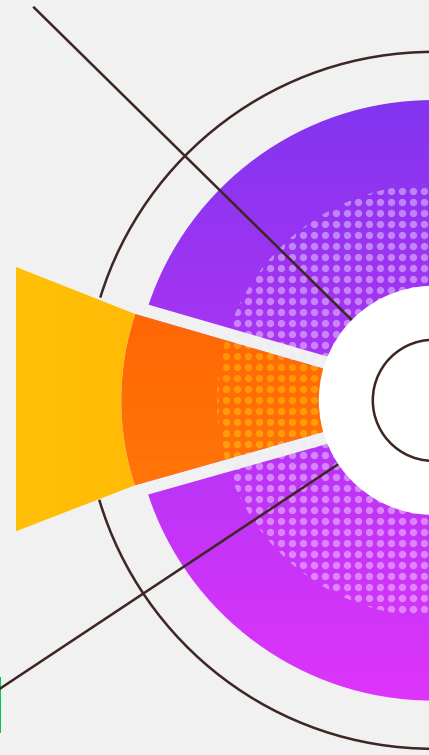
Conduct more video meetings.

51%

Send more emails.

57%

Make more phone calls.

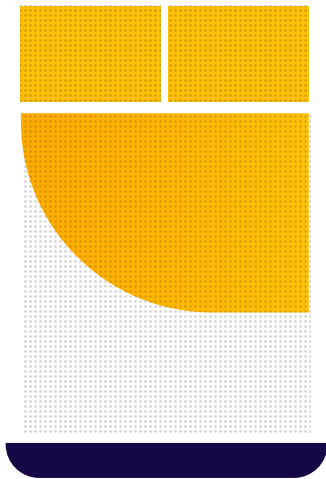


# People like working from home

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91%

experience better work-life balance when working remotely.



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79%

increase their productivity and focus.



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78%

feel they are healthier working from home.



Infographic developed by [NewSourcing](#)

# So, where are we?

We're at home, like it or not—with or without kids and with or without an ideal home office. The challenge remains, as a presale professional, you must do what you can to deliver a great customer experience for prospects on the other end of the line and consistent results for the company that pays you to produce.

Let's dig into some strategies to help you succeed (even in sandals or slippers).



# Taking your work home - the basics

Working from home is obviously not a new phenomenon. However, now that convening in workplaces has become a potentially dangerous health threat, it's a new reality for countless professionals the world over. Among them, of course, are those whose job it is to sell software. Whether you sell a simple SaaS platform, complex software targeting enterprise buyers, or any platform across the spectrum of business needs, you'll inevitably discover focusing on the task at hand can be trying.

The list of distractions is long: kids, pets, noisy lawnmowers, delivery people ringing the doorbell, etc. Your stress level is likely to ratchet-up. Let's begin with helpful tips for successfully setting-up and settling-into a home office. If you feel confident you've got a home office setup and productive routine down pat, feel free to skip this section.

## 1 | Take a deep breath

We're all in this together. We're human. Life at home isn't the same as life in the office. So, when the dog starts barking or the cat jumps onto your keyboard—especially during web-based meetings—try not to come unglued. Take care of what you can. Take a deep breath. You'll do better to laugh it off than panic or apologize profusely. Little harm will come from the little hiccups home life thrusts upon you.

## 2 | Minimize distractions

When you're working from home, family and friends are bound to forget (or ignore) you're working. Try to make it clear that you must not be disturbed. Solicitors are also unlikely to respect your workspace and time. You may want to put a "do not disturb" sign out front.

### 3 Take frequent breaks

The flipside of having more interruptions is, well, having less. Settling-in at home alone, sans the distractions of the traditional office, may actually help you keep your eye on the ball. In fact, [research assembled by Highfive](#) shows the majority of remote workers report greater productivity and many are prone to work longer hours.

The most interesting stat is: 30% accomplish more in less time. Yes, less time. The point is: mind your time. Don't skip meals. Take mental health breaks. Take your mind off the work. Get some exercise. Remind yourself the weekend is for recharging.



### 4 Socialize

You talk to the people at the office. At home, you may be alone. At times, working from a room in your home may make you feel isolated. Reach out and Zoom someone. Or take a little time out to tap into some friendly chitchat on your communication app of choice. It's good for the heart, mind and soul.

### 5 Manage your time

Manage your time by establishing some daily routines and getting organized. Aim to establish a regular and realistic schedule. It can be tempting to work 24/7 when the work is so readily accessible. Don't. It's important to divide work time from free time, so consider rigid start and stop times, a lunch hour, and break times. If there are family members or roommates at home, try to forge some boundaries by helping them understand your schedule.

Consider blocking out your day as well. Giving yourself boundaries for email time, meeting time, demo time, research time, customer correspondence time (you get the idea) will help you stay on-task and maintain a higher level of productivity. Of course, your workday will often call for flexibility, but a good dose of structure will serve you well.



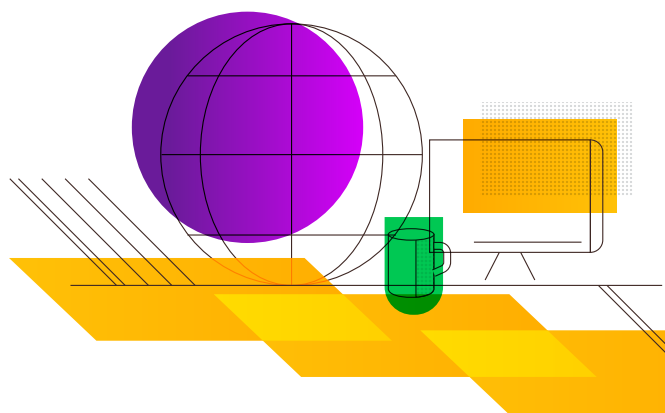
## 6 | Manage your space

Working at home calls for having a designated workspace. The key is to create boundaries, establish a workspace and manage it accordingly.

A den or home office is ideal, of course. However, you may be forced to consider the kitchen, dining room, or a bedroom. If you're lucky enough to have a room solely for your work, it's a good idea to invest some time and money into making it comfortable, well-lit, and practical. You're likely to host or join web meetings so consider your lighting and decluttering the background.

## 7 | Equip your office properly

High-speed internet and reliable phone service are two musts. Upgrade your services at home, if need be. You want to avoid getting dropped—or freezing—during an important call or meeting. The person on the other end may be understanding, but they may not.



## 8 | App-up

Get the apps you'll need, learn what it takes to operate them capably and test them out in advance of important communications. Useful apps that have grown even more popular in the home office era of 2020 include:

- Zoom and Google Meet for video conferencing
- Slack for messaging
- Asana and Trello for assignment tracking and collaboration
- Loom for sharing short video messages
- Miro for whiteboarding
- Google Docs for doc sharing
- And many more—you'll find what you need

# Overcoming the challenges of selling software from home



“There probably isn’t a more directly impacted area than the field sales rep. Every sales rep is now a ‘virtual seller’ (much like the inside sales rep), and all have concerns about how their sales quotas will be impacted.”



**Katie Fabiszak**

Principal Analyst, Forrester

Let’s examine some of the challenges and consider solutions that will help you to continue meeting your sales goals as a software sales professional.

# It's harder to connect



The most prominent obstacle when performing pre-sales remotely is being able to read body language. If somebody is lost during a proof of concept, being able to troubleshoot and get into certain things can be challenging, especially in a one-to-many scenario."



**Owen McClave**

Manager of Solution Architecture, AWS

Obviously, once your home office and computer's equipped the way you need, it's actually quite easy to get online with your prospect. However, facing each other onscreen is hardly the same as connecting on a personal level. Here are some useful tips from presales professionals.

## Make eye contact

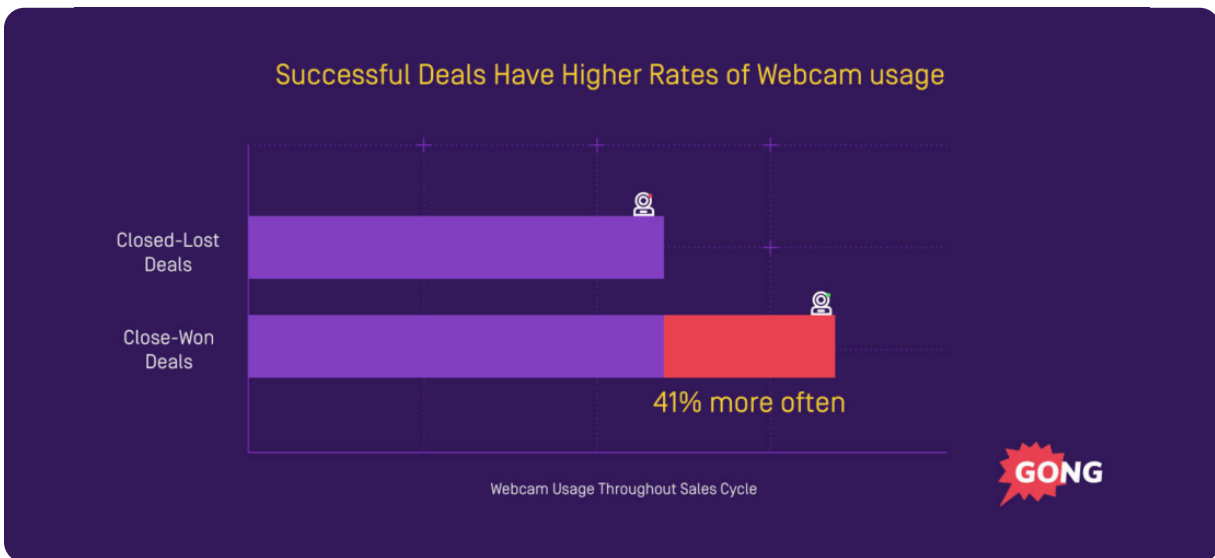
Turn your web camera on, make eye contact and smile. Be as personable as possible, informal even.



We emphasize best practices like turning on your camera from the start because that tends to drive the customer to do the same. The reason why is we want to setup to be able to get feedback, even if it's just seeing their eye contact to gauge if they're paying attention."

Gee Chow

DevOps Specialist, F5 Networks



Closed deals involved the use of webcams 41% more often than lost deals.

"Two senses are more powerful than one." Source: Gong

## Converse one-on-one

Be sure everyone on the call is introduced. Call on people individually, but be aware you may need to control the meeting with the use of your mute button. You want engagement but not noise.



We always chat and directly tag people. When someone joins, we're going to be like, hey, how are you doing? Somebody sees their name and they're like, holy crap, I've got to come and reply to this or respond to this, and people are engaged. Call their names. Ask them a question. Crack some jokes."

Akshat Srivastava

Solutions Architect, AWS

## Select the most appropriate platform

There's no denying Zoom and various web conferencing platforms have gained even more momentum as business communications take place remotely. However, consider the degree of interaction that will best serve your purpose.

If you sell complex enterprise software, a show-and-tell format may not be useful or persuasive enough to demonstrate your solution. Consider supplementing your demos or POCs with CloudShare's virtual lab solution, which is purpose-built to enable sales engineers to quickly spin-up customized, real-world environments necessary to close deals.

## Know your presentation platforms

Whether you'll lean on one presentation platform, or more, and do a simple demo, or complex, you need to master the technology in advance. Set up the platforms you'll rely on and practice. Stumbling through your sales presentation with technical distractions is sure to sabotage your efforts.



# Communications presents some hurdles

As you know, selling software is a highly collaborative process. Everyone on both ends needs to be informed at all points.

## Prepare

Be sure everyone on your team understands everything they need—in advance—to deliver the necessary information and achieve its goals.



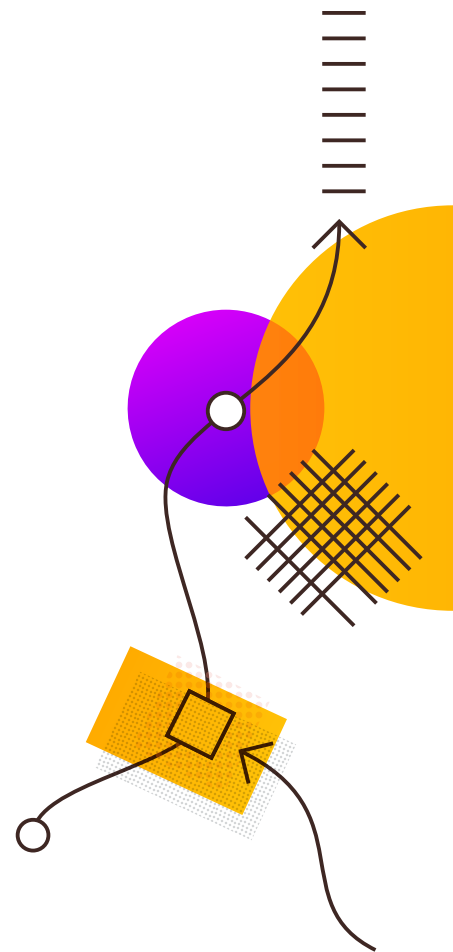
If I could give one piece of advice it is to over-prepare when you're delivering to a customer, because you get one shot, maybe two at best, to deliver the value you need to."

Owen McClave  
Manager of Solution Architecture, AWS



When you are not working from home, you can prepare and say, I'm going to give you these cues during the demo that if I'm doing X, you should do Y. However, when you're working from home, everyone is on the same screen share, you may have text or Slack going, but really there's very limited queuing mechanisms so you have to plan in advance."

Akshat Srivastava  
Solutions Architect, AWS



## Follow-up

Follow-up with your team. Follow-up with your prospective clients. Everyone in the loop including sales engineers, product managers, and subject matter specialists should have a strong grasp of the deal in the works, the objections you may need to overcome, and whatever content (for example, use cases and customer success stories) may help accelerate the sale. Anyone who missed important meetings, calls or demos, should be sent notes and/or recordings.



I would say we follow-up via email mostly but then deliver information that they can go off and consume on their own, like a white paper, or documentation relevant to what we presented."

Gee Chow

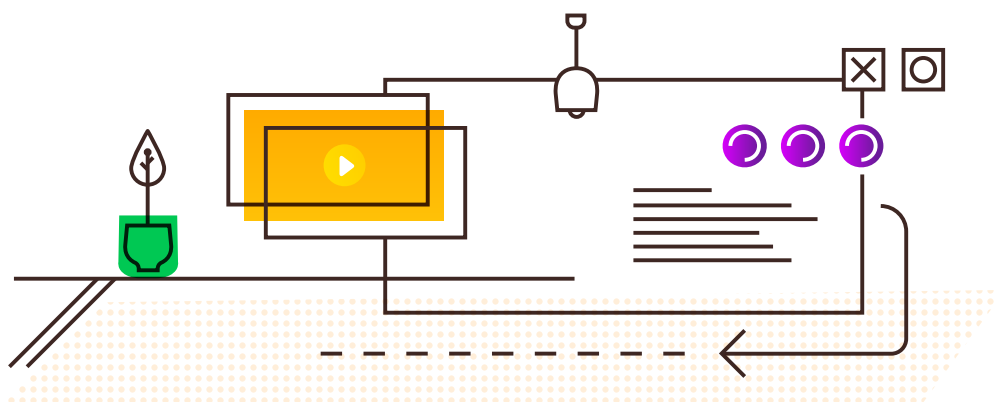
DevOps Specialist, F5 Networks

## Capitalize on content

Chances are, in the name of "sales enablement," your company's marketing professionals commit time and resources to supply you with content in various forms, which you can use to:

- Position your company and product in the most effective way
- Educate prospects at various stages of the buying cycle
- Continuously develop your skills

Additionally, as your prospects spend more time doing online research and connecting with their peers via social media, you'll want to explore any and all programs offered to help you develop social selling skills. The time has come to make connections, nurture relationships, and win trust with your audience via LinkedIn and other social media.



# You must deliver a great demo—virtually

Obviously, you won't be in the same room with your prospect projecting your desktop or conducting an in-person lab. You'll need to remind yourself they could easily begin multi-tasking at any time. Your challenge is to deliver a great demo virtually.

Consider putting the following tactics into play.

## Begin with your best

The opening minutes of your demo must captivate your prospect. So, understand how vital it is to command your prospect's attention and deliver your strongest benefits immediately. Employ an "inverted pyramid" approach by featuring the most important messages and most meaningful exercises first.

## Make it short

Plan to deliver a demo in the span of 15 to 30 minutes broken-up into short, urgent chapters. Sure, you can go longer but only if your prospect wants you to.

## Get feedback and answer questions

Listen closely for any responses you get. Obviously, it's a bad sign if you're not getting any, so aim to create a dialogue. Save ample time to answer questions after you conclude the essential elements of your demo.



Turn off the screen and just have a video chat in the middle of the demo. Ask questions and hear them out."

Akshat Srivastava  
presales solutions architect, AWS

What works for me is usually a more consultative approach where you're doing initial discovery with more listening. Being that we're all remote, we actually focus on trying to show less screens."

Gee Chow  
DevOps specialist, F5 Networks



# Getting an analytical advantage

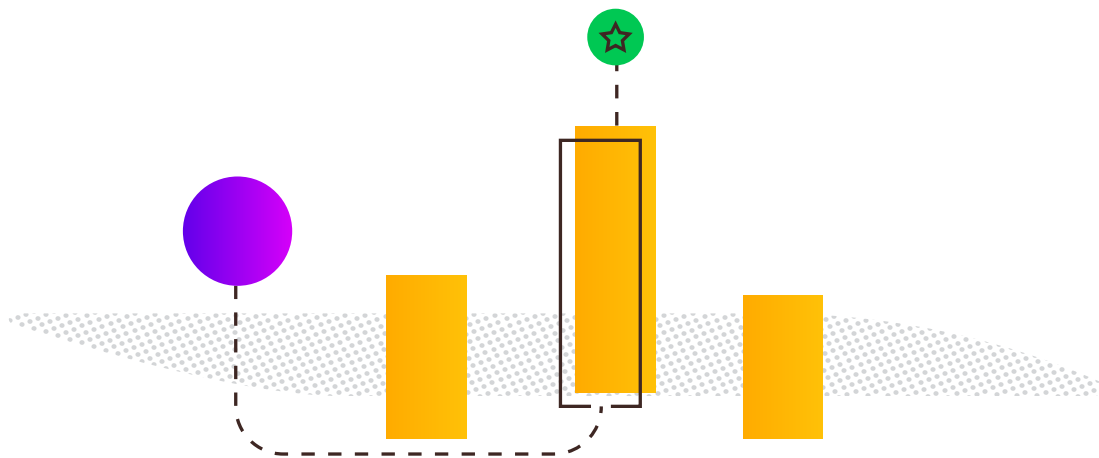
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# 52%

of software vendors report customers  
abandon POCs in progress.



Though reading prospects' body language is a challenge for remote software sales, tracking technology gives you an advantage for "reading" the progress you've made with prospects.



## Basic analytics

A simple technical stack will enable you to determine basic engagement measures such as:



Email opens, clicks, etc.



Document reviews



Website visits and behavior

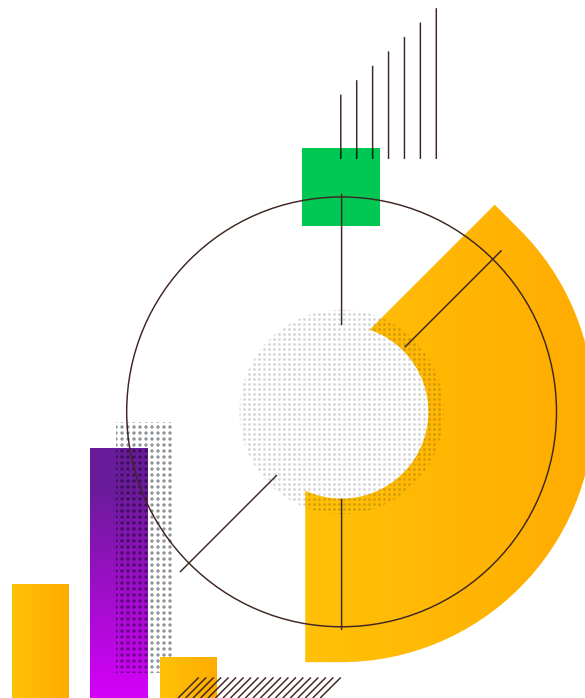


Other interactions

## Advanced analytics

Presales engineers and the sales teams they support claim the most critical need they now face is gaining visibility into the crucial parts of the purchase cycle.

For both product demonstrations and POCs, the real-time data analytics built into CloudShare's virtual IT lab platform enables you to accurately analyze how prospects do—or don't—consume the software you offer them. You get easy access to dashboards to monitor POC progress, identify high and low points of engagement and track every opportunity.



# About CloudShare

The world's easiest-to-use virtual labs for software training, sales demos and POCs

CloudShare provides specialized solutions designed to meet a wide variety of business needs including lab environments for demos and POCs, virtual training, and development and testing. All CloudShare environments are completely customizable and offer on-demand access to infrastructure resources such as servers, storage, networking, and software.

CloudShare customers include many leading software and cybersecurity companies such as Palo Alto Networks, Fortinet, Atlassian, ForgeRock, Salesforce, and Check Point Software Technologies.

To learn more about how CloudShare's advanced lab solutions can benefit your business, visit [www.cloudshare.com](http://www.cloudshare.com).

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