



Scaling Presales

8 Strategies to Boost
Coverage and Customer
Experience With Existing
Headcount



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Driving Presales Productivity Without Increasing Headcount

Sales engineers are often overworked and underappreciated. Increasing demand from Sales makes it difficult to keep up and many presales leaders are looking for ways to increase productivity to close the gap as well as improve the quality of work life for their teams.

This ebook contains several strategies for freeing up bandwidth for sales engineers to do more of what they're best at: strategic consulting conversations, preparing better for and delivering custom technical demos, giving personalized attention to key accounts.

Introduction

What Does It Mean to Scale?

Sometimes we think “scaling” means to hire more people. I often hear leaders say, “We’re really scaling the organization right now” when what they mean is “We are hiring like crazy.” In reality, scaling is not hiring. True scaling means to get exponential results from existing resources.

8 Scaling Presales Micro-Strategies

In Scaling Presales we will show you how to drive presales productivity higher and meet increasing demand without increasing headcount. You’ll learn eight micro-strategies that you can choose to combine in different ways to create a Scaling Presales Strategy for your organization.

Objective:

Give you a model (8 micro-strategies) to define your own strategy for scaling presales at your organization.

- Define the Gap
- Better Qualification
- Categorizing Demos to Align with Buying Process
- Equipping Sales to Demo
- Leveraging Interactive Demo Automation
- Using Video for Multilingual Market Coverage
- Conducting Webinars for Mass Live-Demos
- What KPIs Show if Your Making Scaling Progress?

Also, just to make sure we’re all on the same page, let’s talk about a few definitions. Sometimes people think pre-sales are BDRs (Business Development Reps), but when we’re talking about presales, we’re talking about sales engineers—also known as solution consultants. They are the deep experts on the product and technologies, trained in effective discovery and consultation techniques and get involved in the sales process to craft and demo solutions for key prospects. So if you happen to not be a presales professional and are thinking we’re focusing on BDRs and setting appointments, that’s not what presales is about.

What Are the Obstacles to Scaling Presales?

Causes Behind Overloaded Demand for Demos

One of the big challenges to scaling presales is an overload in demo demand. Some of the reasons for this include:

- Sales & marketing mismatch
- Training lag between new AEs and SEs
- Multilingual market coverage
- Going down-market where volume is higher
- Under-qualification leads to “wasted” demos

Resulting Problems From Overloaded Demand for Demos

The resulting problems that come from this is that clients end up waiting longer than they want and should have to. Sales also ends up waiting.

Recent research shows that the median time prospects wait for a demo after requesting one was five business days and over 60% of respondents indicated prospects had to wait at least a week. And 20% said they have prospects waiting at least 2 weeks for a demo. That's a terrible customer experience, not to mention frustrating for the sales team.

Overloaded demo demand results in wasted resources; overworked sales engineers, robotic repetition, a lack of enough time for strategic consulting and so on.



Download the 2020 Sales Engineer Compensation & Workload Report

Demo Delays in Business Days

Median: 5

Over 60% indicated prospects must wait **at least a week to get a demo.**

Over 20% have prospects waiting **at least 2 weeks for a demo.**

Study: Sales Engineer Compensation & Workload

Benefits of Scaling Presales

Benefits of scaling presales include:

- Better CX = clients get what they need quickly = shorter sales cycle and improved perception of company
- Sales team get what they need quickly = shorter sales cycle and improved perception of Presales team
- Efficient use of resources = better margins
- Better alignment of resources with demand = SEs are not overworked = less burnout
- More strategic consulting, less robotic repetition

When we implement scaling strategies effectively, the benefits are really wonderful. So it's worth the effort to make progress in this area.

First, it delivers a better client experience so the clients will get more of what they need more quickly. This often leads to shorter sales cycles, not to mention improved perception of your company and brand. Sales teams will get what they need quickly, and they also will have a better perception of your presales team. Efficient use of resources results in better margins. And then, of course, you get less burnout from sales engineers who are overworked or sometimes just bored with the repetitive tasks (e.g. doing standard demos over and over) that don't challenge them.

Results From Scaling Presales at an Enterprise Software Company

Oracle has used the Consensus interactive video demo platform to automate product demonstrations and implement some of the scaling strategies you'll read about in this ebook. Oracle's presales team in their Construction and Engineering Global Business Unit was able to scale their presales productivity by over 30% with their existing headcount.

In the first six months they saved 12,800 presales man hours, or the equivalent of 6.2 FTEs.



At A Glance

Sample Team Size	Avg Salary Presumption*	Period
30	\$120K Annually	1 Year

Results

3200	Total number of automated micro-demos sent.
12,800	Total presales man hours saved through the use of automated micro-demos; equivalent to 6.2 FTEs.
\$738,462	Value of time savings based solely upon presales rep salary. This does not account for benefits accrued from faster response times, consistent messaging, or travel savings, etc.
\$75K	Highest individual deal value closed exclusively through demo automation, i.e. <i>without any face to face engagement</i> .
\$4K	Average cost** of an international onsite, which have been largely eliminated through demo automation.



Download the Oracle Presales Case Study

What Needs Changing at Your Organization?



“... he not busy
being born is busy
dying.”

Bob Dylan
from “It’s Alright, Ma.”

Reinventing Your Presales Organization

These Bob Dylan lyrics say to me that if we aren't reinventing ourselves we are in the process of failing, even though we may not be aware of it. We're never standing still. I have a friend who is a long distance runner and he said he used to think that he could just run in maintenance mode during the off season, and then he realized that it never happens. You can't just maintain. You are either decreasing your ability or you're increasing your ability, but it's almost impossible to just actually stay at one level.

As a presales leader, you need to reinvent and restructure how you go about delivering great customer experiences in the sales process and helping buyers get everything that they need to make an effective buying decision.

Strategy Means Making Tradeoffs

One of the key principles to any strategy is tradeoffs. If you are not making any tradeoffs, you don't really have a strategy.

In other words, unless you know what you're saying No to, you have no strategy. If you say Yes to everything, you have no strategy.

In some cases, sales and presales teams are prone to do this, because they have the erroneous idea that whatever the customer asks for is right. They don't have a defined strategy. So by saying Yes to everything you end up saying No by default to a better way of doing things.

On the other hand, by saying No to some things means saying Yes to more of what you want. So we're going to spend some time talking about how to define what you really want.

**Strategy =
Tradeoffs**

**Unless you know what
you're saying NO to,
you have no strategy**

**Saying NO means
saying YES to more of
what you want**

Defining the Gap

To scale effectively we need to start by defining the gap we need to address and where scaling strategies need to be applied.

There are two types of gaps:

2 Types of Gaps

Gap 1: Increasing Demand Gap

The number of hours that are going to be required in the future because of increasing demand without linear budget increases.

Gap 1: Increasing Demand Gap

The number of hours that are going to be required in the future because of increasing demand without linear budget increases.

Definition of “Increasing Demand” Gap

This gap simply means that for whatever reason, you have an increasing demand for presales resources coming from the sales team. It could be that marketing is spending more and generating more leads. It could be that Sales is hiring and you don't have the correlating budget increase to hire in presales. It could be that you're going down-market where volume is higher. Or perhaps qualification on demos is getting worse and worse and you are spending more time on “wasted” demos. Somehow the demand is growing.

There are two key questions:

- What's the gap in our capacity to handle the demand and the demand that's coming in?
- What is causing this gap?

Definition of “Key Activity” Gap

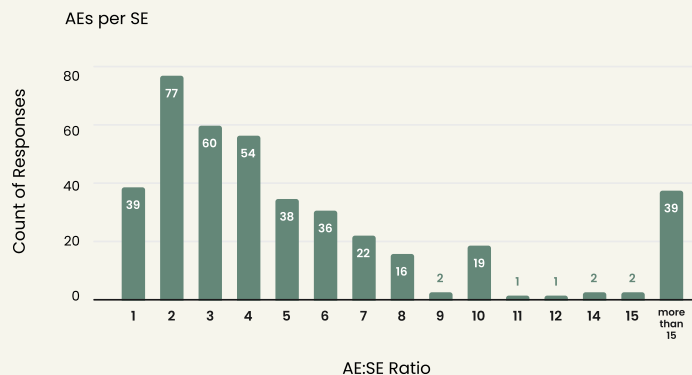
“Key Activity” gap analysis means taking a deeper look at the activities your SEs are currently doing and compare them with the activities they need to be doing to meet the increased demand gap. For example, if SEs are doing too many repetitive standard demos and are compromising their time on discovery, strategic consulting or other key activities, then perhaps we can find a way to take so many repetitive standard demos off their plates.

Let’s take a look at how to conduct each type of gap analysis.

Conducting an “Increasing Demand” Gap Analysis

Ratio of AEs to SEs

Median: 4:1



There are many different ways to conduct a demand gap analysis. In this ebook I’m sharing a simple demand gap analysis using the AE:SE ratio.

Research in the Consensus Sales Engineer Compensation and Workload survey shows the median AE:SE ratio is 4:1.



Download the 2020 Sales Engineer Compensation & Workload Report

Let’s start with a scenario. In this scenario, suppose that today we have 40 SEs and we have an AE:SE ratio of 4:1. Now suppose that the future sales team is going to be 230 people. That future state of 230 salespeople divided by four (i.e. the AE: SE ratio) means we need 58 sales engineers to meet the future demand. That’s if we don’t change anything—if we keep doing things the same way and don’t find a way to scale.

So that's the first step in this simple gap analysis approach. Of course, if we subtract the number of sales engineers we have today, this means we need to hire 18 new SEs. The problem is, this really isn't scaling— this is just linear hiring. When we talk about scaling, we're not talking about hiring, even though hiring is always an important part of any plan. The problem is that oftentimes sales will hire without presales getting a compensatory budget to hire on the same correlated path.

Simple Demand Gap Analysis

(# of Future Sales / AE:SE Ratio) - Current SCs

EXAMPLE

if AE:SE Ratio = 4

Future Sales = 230

Current SEs = 40

$230 / 4 = 57.5$ (future SEs needed with no change in process)

$57.5 - 40 = 17.5$ (increase in SEs to meet demand at current ratios)

EXTRAPOLATE:

- **If we can't hire**, the ratio becomes 5.75:1. That's ~45% increase. I have to free up 22 hours per week per SC
- **If we could hire 6 new SCs**, that makes the ratio 5:1. That's a 25% increase. I have to free up 12.5 hours/week

So what if you can't hire enough to keep up? What if that's just not in the cards? That's the scenario here. There are lots of other reasons that could cause a demand gap, but in this scenario we'll assume it is an increase in sales hiring.

Let's extrapolate a little bit. If we can't hire at all, the ratio ends up becoming 5.75:1, that's a 45% increase and that means we have to free up 22 hours per week, per SE. However, sometimes you get some budget to hire, just not enough to keep up linearly with the sales hiring.

So suppose that we could hire six new solution consultants instead of the eighteen that we need. That would end up making the ratio 5:1. That's a 25% increase in demand even if we get the six new hires. So we have to somehow either ask everybody to work an extra twelve and a half hours a week (a good recipe for losing some of your team) or we have to try to free up 12 and a half hours a week through scaling strategies.

In summary, in this scenario our "Increasing Demand" gap is 12.5 hours per week per SE (or 25% on a 50 hour workweek). Now multiply this by your total team headcount to find the demand gap for the entire team. If you have a team of 25 SEs, you've just identified that your demand gap is 312 hours per week or 16,250 hours per year.

Conducting a “Key Activity” Gap Analysis

In this scenario, let's suppose that we know that we have an increasing demand gap of 12.5 hours per week per SE. We now need to conduct a “Key Activity” gap analysis to see what activities are candidates for our scaling strategy focus.

Do You Know What Activities Your SEs Are Spending Time On?

The first question to ask when conducting a “Key Activity” gap analysis is “Do you know what activities your SEs are spending their time on?”

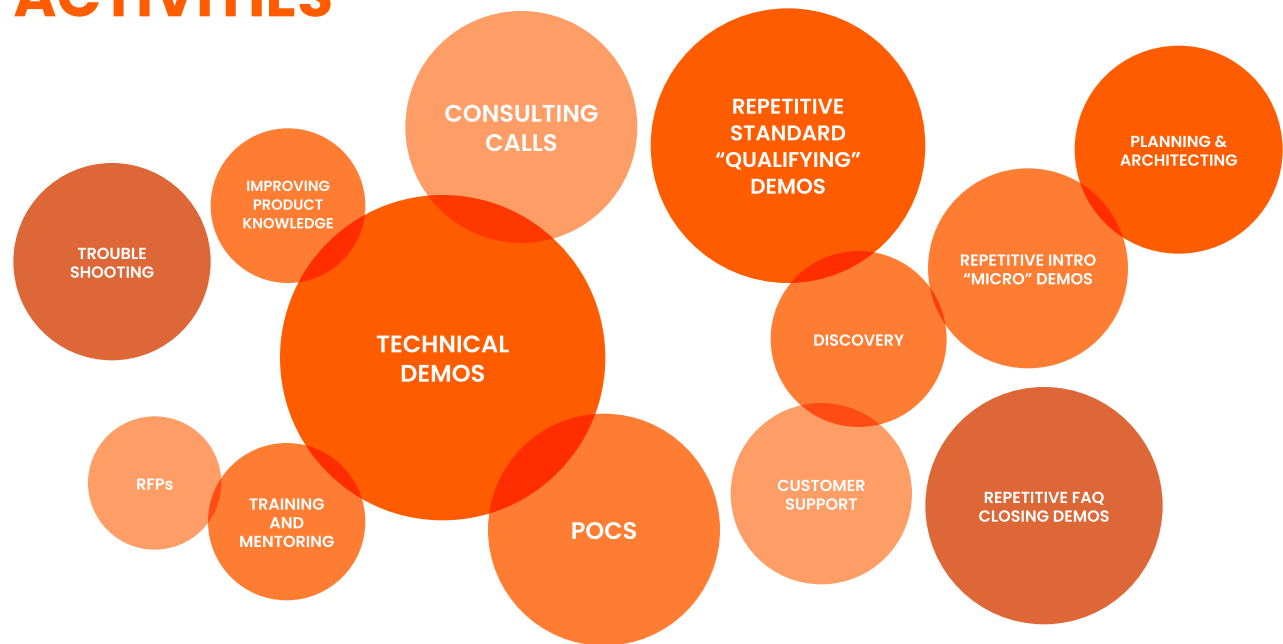
I think that it's pretty common to not fully understand how sales engineers spend their time. Not to encourage micromanagement, but if you don't know how they're spending their time, how can you know how to adjust your processes or KPIs?

Short of tracking every activity that they do (which is actually becoming possible with some of the tools that are coming online these days), I recommend talking to different team members and perhaps surveying your team and asking them how many hours per week they spend on activities X, Y, or Z, or how many hours per month. In this ebook, we're going to look at it from a weekly perspective. (Note: This analysis could be more beneficial to do it by month depending on what your organization is like.)

Potential activities to list on your survey could include:

- Discovery
- Technical Demos
- POCs
- Consulting Calls
- Repetitive “Micro Demos”
- Repetitive Standard “Qualifying Demos”
- Repetitive FAQ and Closing Demos
- Customer Support
- Improving Product Knowledge
- Planning and Architecting Solutions
- RFPs
- Training and Mentoring
- Customer Support

SALES ENGINEER ACTIVITIES

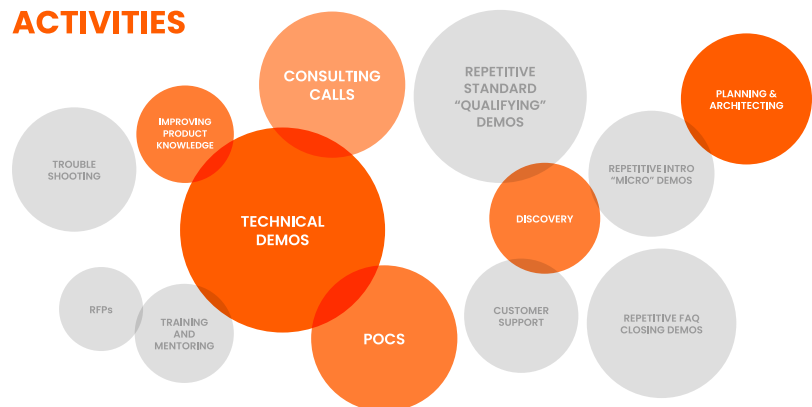


When you look at all of the different things that they get pulled into it's easy to see why SEs can get overloaded. It's also easy to see why SEs are arguably the most valuable resources in your entire go-to-market strategy.

The question that we should ask is what's the best use of the SE's time? What are the key activities that would change the game if they could spend more time on those?

The answer will be unique to your organization. But let's just suppose that these are the key things that we want them to spend as much time as possible on: technical demos, POCs, consulting calls, discovery, planning and architecting, and improving product knowledge.

KEY SALES ENGINEER ACTIVITIES



What would you say “No” to so that you can increase the time your SEs spend on the “best” activities?

If we could get them to spend 80% of their time on these key activities, then we would say that each sales engineer is really being most effective. If they're spending too much time on other things, they're not doing what they're uniquely skilled to do.

Are there some of these other activities that we can offload so that we can increase the amount of time they spend on these key activities?

Remember tradeoffs? What would you say No to so that you can increase the time your SEs spend on the best activities?

Obviously, we can't just say “No, we're not going to do that.” Instead of saying No entirely, we can ask, “What other way can this be handled?”

The Theory of Constraints

The Theory of Constraints is a methodology for identifying the most important limiting factor that stands in the way of achieving a goal and then systematically improving that constraint until it's no longer the limiting factor. The limiting factor is often referred to as a bottleneck.

What is the bottleneck in presales?

It may vary from company to company. Maybe the biggest bottleneck is proof of concepts and getting those set up and managed. Maybe it is discovery. As with many of the companies we talk to, in the scenario we're using for this ebook, the bottleneck is doing repetitive and often unqualified demos

Spreadsheet Sample for Calculating Activity Gap Analysis

Once you know what your SEs are spending their time on, you're ready to look for opportunities. Let's take a look at how using a spreadsheet can help.

	CURRENT STATE		FUTURE STATE		GAP HOURS / Week
	Hours Worked / Week	50	Hours Worked / Week	50	
SC Time Usage	100%	50	100%	50	0
* Discovery	5%	2.5	10%	5	2.5
* Improving Product Knowledge	4%	2	4%	2	0
* Planning and Architecting	12%	6	15%	7.5	1.5
* POCs (setup and maintain)	10%	5	15%	7.5	2.5
* RFPs	7%	3.5	7%	3.5	0
* Strategic Consulting Calls	5%	2.5	10%	5	2.5
* Technical Demos (Prep & Delivery)	15%	7.5	20%	10	2.5
Repetitive Closing and FAQ Demos (Standard Demo)	8%	4	2%	1	-3
Customer Support	6%	3	3%	1.5	-1.5
Repetitive Micro Intro Demos	8%	4	2%	1	-3
Repetitive Standard Demos	10%	5	2%	1	-4
Training & Mentoring	5%	2.5	5%	2.5	0
Troubleshooting	5%	2.5	5%	2.5	0



Download the Key Activities Gap Analysis Spreadsheet Example (.xlsx)

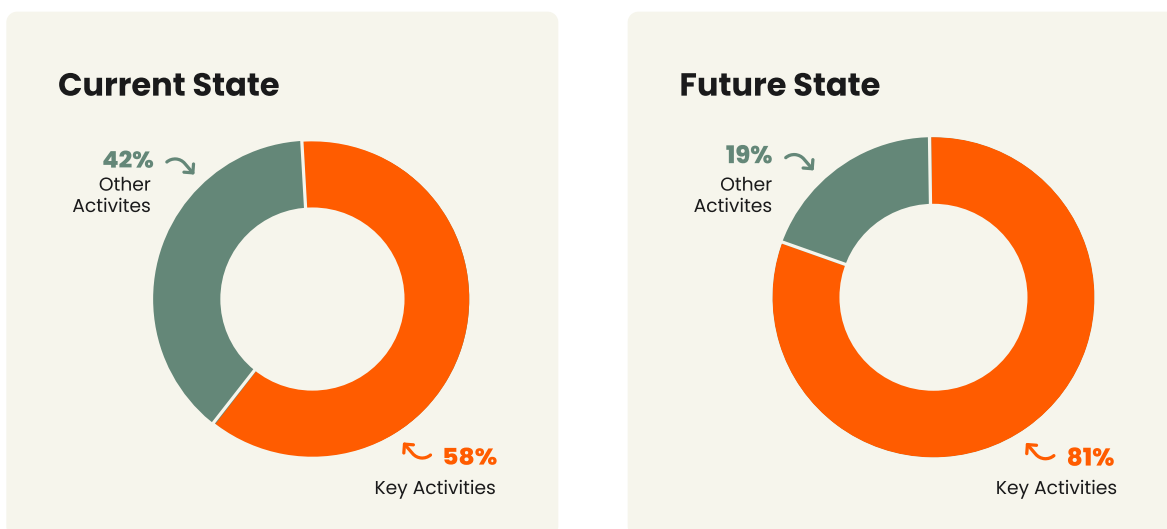
Look at the first two columns in the spreadsheet shown above. What we're doing here is listing out the different activities and the percentage of time spent on each activity. I'm assuming a 50 hour work week in this example. The activities with asterisks are the ones that we want them to spend more time on. If we can somehow offload some of these other things and have them spend more time in here then we can increase our output on these key activities and handle increased demand.

The table cell in blue shows the desired increase. You can see that we would need to save 11.5 hours of time per week (red cell) to increase the time spent on key activities.

Here's a summary of the same table.

	CURRENT STATE		FUTURE STATE		GAP HOURS / Week
	Hours Worked / Week	50	Hours Worked / Week	50	
SC Time Usage	0%	0	0%	0%	0
Key Activities	58%	29	81%	40.5	11.5
Other Activities	42%	21	19%	9.5	-11.5

Another broad way to look at this is that they are spending 58% of their time on key activities today and we want to increase their key activities to 81% of their time.



To increase their time on key activities to 81%, we need to decrease the amount of time they spend on nonkey activities. In this example, we'll decrease their time spent on repetitive demos and customer support:

	CURRENT STATE		FUTURE STATE		GAP HOURS / Week
	Hours Worked / Week	50	Hours Worked / Week	50	
SC Time Usage	100%	50	100%	50	0
* Discovery	5%	2.5	10%	5	2.5
* Improving Product Knowledge	4%	2	4%	2	0
* Planning and Architecting	12%	6	15%	7.5	1.5
* POCs (setup and maintain)	10%	5	15%	7.5	2.5
* RFPs	7%	3.5	7%	3.5	0
* Strategic Consulting Calls	5%	2.5	10%	5	2.5
* Technical Demos (Prep & Delivery)	15%	7.5	20%	10	2.5
Repetitive Closing and FAQ Demos (Standard Demo)	8%	4	2%	1	-3
Customer Support	6%	3	3%	1.5	-1.5
Repetitive Micro Intro Demos	8%	4	2%	1	-3
Repetitive Standard Demos	10%	5	2%	1	-4
Training & Mentoring	5%	2.5	5%	2.5	0
Troubleshooting	5%	2.5	5%	2.5	0

By increasing key activities and decreasing time spent on repetitive demos, we save 11.5 hours per week per SE. Across an entire team of 40 SEs, that is 23,920 hours per year.

Annual Team Analysis			
	Current State	Future State	Increase in Hours on Key Activities
# of SCs	40	40	
Key Activity Hours / Year	60,320	84,240	23,920
Other Activities / Year	43,680	19,760	-23,920

This begs the question: how can we get them to spend so much less time on repetitive demos so we can gain the increase in key activities?

The Scaling Solution: Using the Principles of Eliminate, Automate, and Delegate

If repetitive demos are the biggest limiting factor—the bottleneck—then here are some key questions for any scaling exercise:

- Are there demos we can **eliminate**?
- Are there demos we can **automate**?
- And are there demos we can **delegate**?

Obviously, there's a tradeoff here. We're saying we're not going to deliver all demos live with sales engineers. We're going to try to eliminate some.

Key Questions to Finding Scaling Answers

Repetitive demos are one of the biggest limiting factors.

Questions:

- Are there demos that we can **ELIMINATE**?
- How can we **AUTOMATE** demos?
- How can we **DELEGATE** demos?

*Principles from productivity book by Rory Vaden called Procrastinate On Purpose

Which ones do we want to eliminate and why? Can we automate some using technology? Can we delegate some to Sales to deliver? I'll address each of these questions a little later in this ebook.

To answer these questions, we first need to understand the different types of demos, because not all demos are alike.

The Six Demo Types

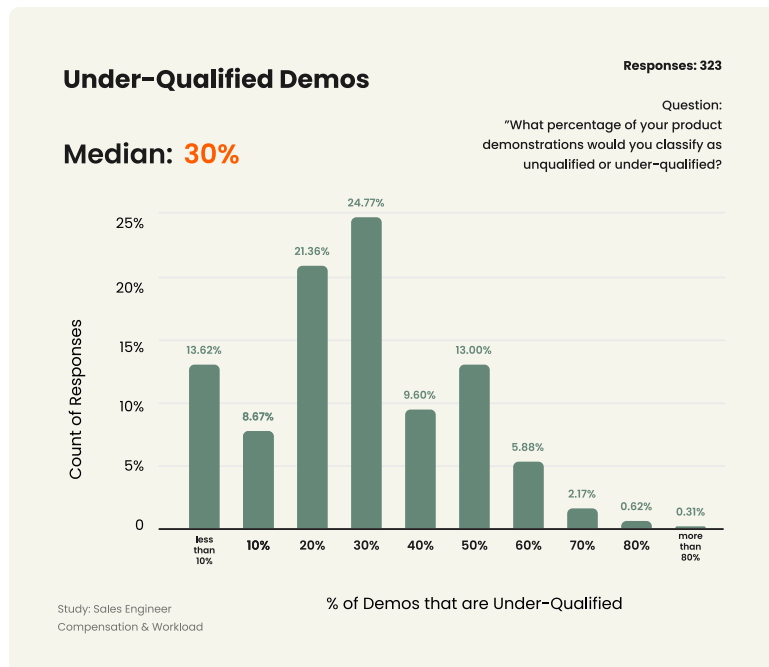
When we hear the word “demo”, sometimes we think of only one type of demo: the technical demo. In reality, SEs are involved in preparing and delivering many types of demos that correspond with the needs of the buyers as they go through the buying process. The six demo types are:

- **Vision Demo.** At the beginning of the buying process, this is a presentation often delivered by Sales, not SEs, that focuses on the value proposition: the problem, solution, and benefit
- **Micro Demo.** Also at the beginning of the buying process, this is a short demo delivered by SEs that focuses on the product but is very brief and introductory. It often happens when a sales rep asks, “Hey SE, this prospect has 20 minutes. What can you demo in 20 minutes?”
- **Qualifying and Discovery (or “Standard”) Demo.** SEs usually deliver this demo at the request of a prospect to “learn more”. The problem here is that, as with Micro Demos, the prospects are often still highly unqualified and often results in a “wasted” demo.
- **Technical Demo.** This is where SEs shine. We want them to spend more time here. This is the highly customized deep-dive demo where SEs are invaluable.
- **Closing Demo.** The Closing Demos are often responses to questions at the end of the buying process after the buyer has already decided to purchase but is attempting to de-risk the decision. Do you have an integration with this or that system? How do you handle GDPR? Tell me more about migration of my data to your system?
- **FAQ Demo.** FAQ Demos are those demos delivered in response to the sales reps asking, “Can you hop on a quick call to help explain X, Y, or Z?” They often follow after another demo type and can happen anywhere throughout the buying process.



Now that we've reviewed the different types of demos we can get back to the question: "What demos can we eliminate, automate, or delegate?"

What Demos Can We Eliminate?



How many of the demos your SEs do are under or unqualified? More than half of the respondents to the Consensus Sales Engineering Compensation and Workload survey said 30% were unqualified. One in five respondents said that more than half of their demos were unqualified. This is obviously a huge problem, and a huge opportunity.

What we really want to eliminate are unqualified demos. If we could eliminate those unqualified demos, that would free up an enormous amount of time.

How can we eliminate under qualified demos?

Better Qualification: The Demo Qualified Lead (DQL)

Most go-to-market teams have several lead qualification gates through which leads must pass before they get assigned to other resources. These include Marketing Qualified Leads (MQL), Sales Qualified Leads (SQL), and so on.

We recommend that you implement a new type of lead qualification gate that we call the Demo Qualified Lead (DQL). This is the qualification standard a lead must go through before a presales resource can get involved.

Demo Qualified Lead (DQL)

INQ MQL SAL SQL SQO DQL Technical Demo/POC

At least one key qualification is whether or not the lead will engage with either an interactive video demo first, or a shorter introductory demo that you delegate to your sales team to deliver first. If they're not willing to do that, then we should ask the question: "Are they really qualified enough to merit as a presales resource?"

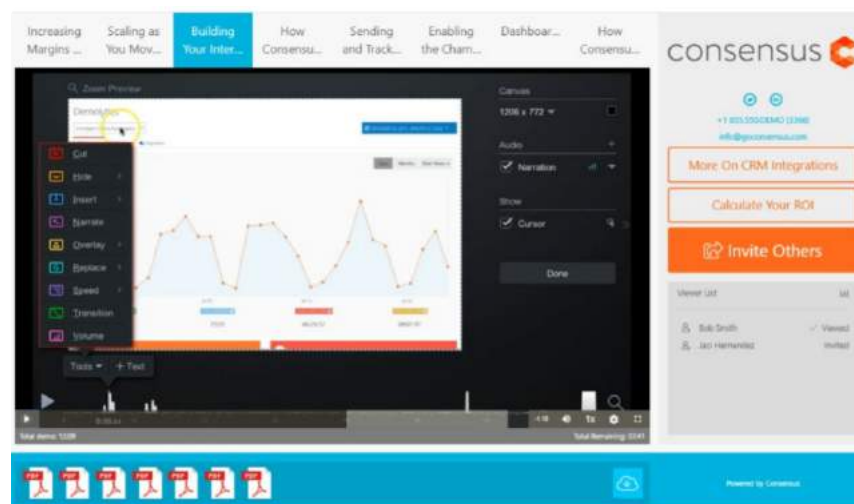
Intelligent Demo Automation: What Demos Can We Automate?

The next principle of scaling is to automate what we can. How can we automate demos? Which types of demos should we automate? Which types of demos should we not automate?

What is Demo Automation?

So what is demo automation? In brief, intelligent demo automation starts with sales engineers making screen recordings of their software. These recordings get loaded into an interactive video demo format through an easy-to-use online process.

At that point, they have created a reusable library of interactive video demos that Sales can use. Then the sales rep chooses the pre-built interactive video demo they want to send out to given prospects, and creates a custom link to send it out to the prospect.



What is Demo Automation?

As those prospects engage with a demo, they identify themselves as they enter the demo or if they're new viewers, they can add themselves and register for the demo. Consensus automated demos automatically personalize the demo content to each prospect's unique interests through a proprietary patented technology.

Choose What is Most Important to You to Personalize Your Demo.

Title	Very Important	Somewhat Important	Not Important
Increasing Margins with Consensus ⓘ	☒	☐	☐
Scaling as You Move Up or Down Market ⓘ	☒	☐	☐
Enabling the Champion to Sell For You ⓘ	☐	☒	☐
Building Your Interactive Automated Demos ⓘ	☒	☐	☐
How Consensus Personalizes the Demo ⓘ	☐	☒	☐
Sending and Tracking Demos ⓘ	☒	☐	☐
Demos in Multiple Languages ⓘ	☒	☐	☐
Dashboards and Demolytics ⓘ	☐	☒	☐
How Consensus Integrates Into Your Workflow ⓘ	☐	☐	☒

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Prospects are asked to rate each topic in the demo as very important, somewhat important or not important. The demo automation platform dynamically pulls together video clips and documents based on these responses, and it delivers it through an interactive video demo player so that each prospect experiences the demo in the way that is most relevant to them.

The system notifies the sales team as different stakeholders engage and the sales team can look at different types of engagement analytics, including who the demo was shared with to discover other stakeholders.

Name ⓘ	Status ⓘ	Time Spent ⓘ	Increasing Margins With Consensus	Building Your Automated Demos	How Consensus Personalizes the Demo	Sending and Tracking Demos	Enabling the Champion to Sell For You	Demos in Multiple Languages	Scaling as You Move Up or Down Market	Dashboards and Demolytics	Actions
Nigelman, Ben	1 views	16:16									View Share
Lachin, Karen	1 views	00:04									View Share
Hiro, Tomomasa	2 views	34:07									View Share
Wojcik, Tomasz Kowalska, Katarzyna	1 views	05:09									View Share
Mack, Li	2 views	16:40									View Share
Rajarat, Renukany	2 views	16:27									View Share
Prabhakar, Renuk	1 views	09:26									View Share
Gutierrez, Benjamin	1 views	17:07									View Share

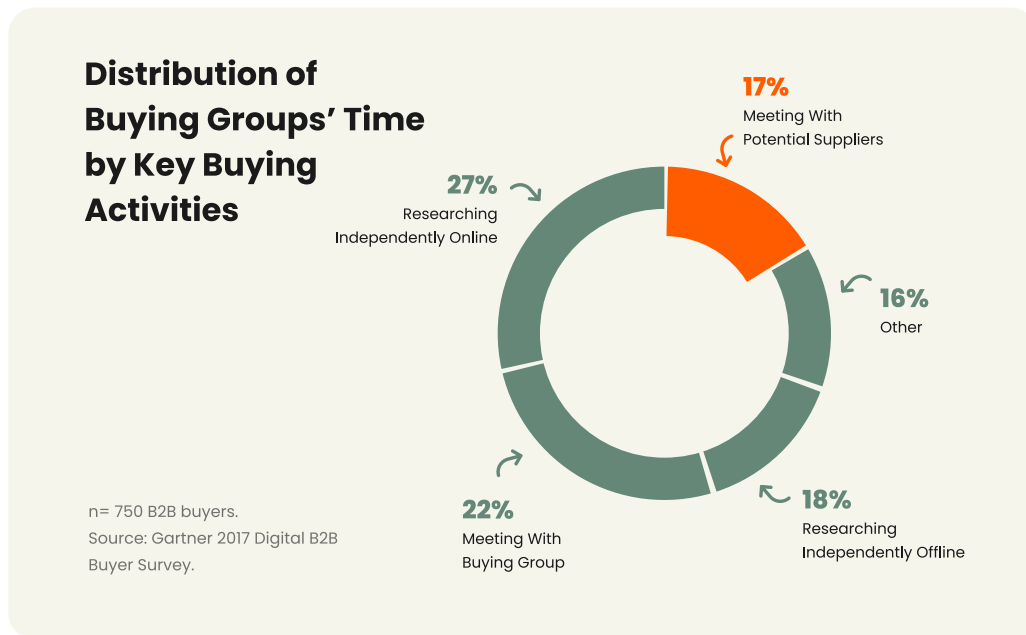
Which Demo Types Are Appropriate to Automate?

Five out of the six demo types are good for automation. The one that we don't recommend automating is the custom technical demo. Not every prospect is going to engage with an automated demo, but many will and that can help free up time to allow sales engineers to stop doing so many repetitive demos and focus on what they're uniquely capable of doing: strategic solution consulting.



Where Should You Use Automated Demos?

Research from Gartner shows that buyers are spending only 17% of their buying activities with vendors. This means that we have to figure out how to be part of the conversation even when we're not there.



Below is an infographic that shows where to use different types of automated demos in between the live sales meetings. This is what we call "Selling in the Gaps".

What we're talking about here is different types of demos being used at different stages of the sales cycle. Note that we're not suggesting that the technical demo is automated. But each of these demos ahead of that technical demo (the vision demo, micro demo, and qualifying demo) could all be qualification gates before you bring on a presales resource. The prospect is then a Demo Qualified Lead (DQL).



Equipping Sales to Demo: What Demos Can We DELEGATE?

So the next principle after eliminate and automate is delegate. Can we delegate any of these repetitive demos to AEs or BDRs so that even if the prospect doesn't engage with an automated video demo, we could have the sales reps or BDRs deliver the introductory demo without having to get presales involved?

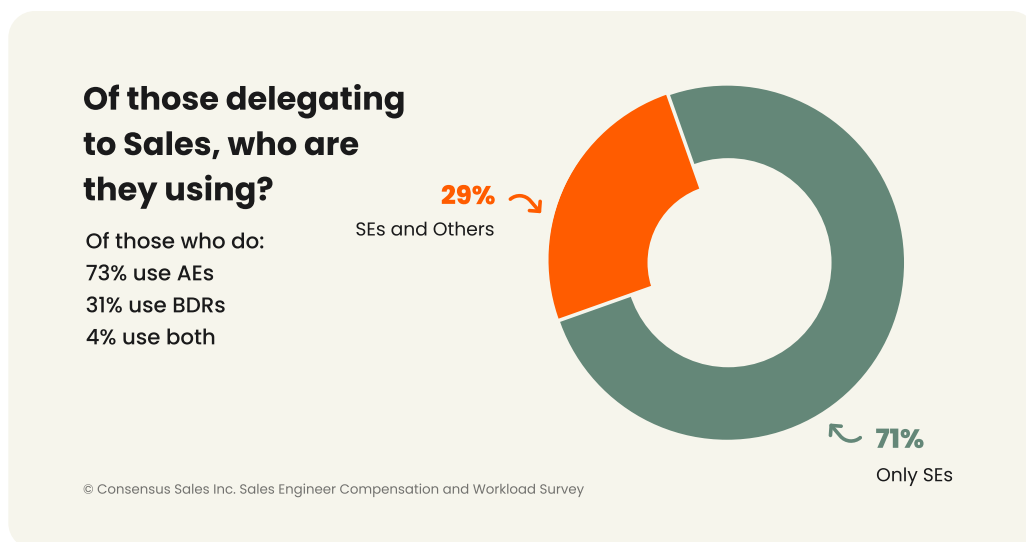
Mental Focus and Fragmentation

Automating and Delegating demos is not just about the amount of time SEs have to spend on repetitive demos, it's also about the fragmentation of their focus time.

The types of things that sales engineers are uniquely capable of doing (and really good at) often take a lot of focus time. Even though they may only have to jump off for 20 minutes and do one of these micro demos, it can really be disruptive. In Gary Keller's book, "THE ONE THING", he mentions research that suggests that even if you're highly focused, glancing away at a text message for two seconds can take as long as three minutes to mentally get back to where you were in your state of focus. You can imagine that if you're deep down into setting up a POC or preparing for a custom technical demo and all of a sudden you've got to bounce out to do a micro demo and then come back, how disruptive that must be. The mental switching costs are higher than we think.

Are Companies Already Delegating Demos to Sales?

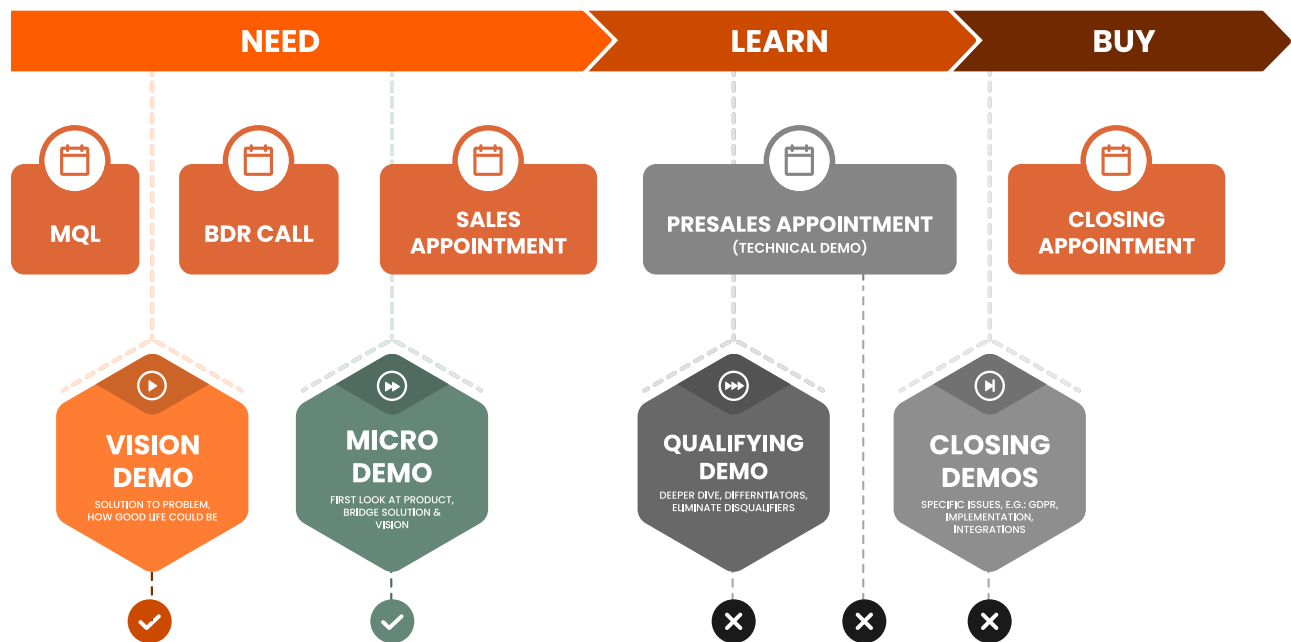
According to research at Consensus, 29% of respondents said that they're having more than just SEs deliver demos of some kind. Of those who are delegating, 73% are using AEs, 31% are using BDRs, and 4% are using both.



What Demo Types Are Good to Delegate?

In my opinion, the demos to delegate are the vision and micro demos at the top of the sales funnel. The buyers aren't ready to dive very deep yet, so you can often provide enough information on product to the sales team for them to give the prospects a peek. That frees up the sales engineers.

This has the added benefit that it prevents Sales Engineers from unwittingly demoing too deeply too early in the buying process, which can also lead to prospects getting overwhelmed.



How to Delegate Demos to Sales

Here are a few ideas on how to delegate demos to the Sales team.

First, delegate the Vision Demo. Use slide decks that are focused on the problem, solution, and benefit with added screenshots. Salespeople almost always already have a slide deck that focuses on the value proposition. Take some of those value prop slides and add some screenshots as well. The buyer doesn't often need to see more than this at this early buying stage anyway.

The Micro Demo is more focused on the product itself but still in the early stage. You may want to record simple screen recordings for sales reps to play back. You could include them in a navigable slide deck and the reps could click on each video image and play the videos. You can either have them play the videos and have the sales engineer's voice narrating or you could have a script in the slide notes that the salespeople read as the screen recordings are playing.

Finally, use [intelligent demo automation](#)—that library of reusable interactive video demos that sales reps and BDRs can send and track. Delegating using demo automation reduces the number of live demos they have to do, and of course it helps accelerate the sales cycle as well.

Multilingual Market Coverage

Another key challenge to scaling presales is multilingual market coverage, which is particularly acute in areas of the world like EMEA or APAC. To address this scaling challenge, I recommend using screen recordings or intelligent demo automation. Use tools like Screencast-o-matic or Camtasia to record the demo in the primary language, then dub over the narrator voice with a native speaker. Use captions in the native language if you don't want to try to get a voice narrator in the native language.

We have a customer from a large Fortune 500 company operating in France, selling all throughout EMEA. They recently told me that they had an interactive video demo that was in Dutch, and sent it out when one of the stakeholders asked about an add-on product. Instead of having to get a presales counterpart involved that could speak Dutch or a translator lined up, they sent the interactive video demo in Dutch and they got the upsell the same day because they were able to deliver so quickly.

Webinars – Live Mass Demos

Another tool to help scale presales is through webinars or live mass demos. This actually helps draw in some prospects who are not ready to engage with sales yet. Post on your website that you have different prescheduled webinars where you're demoing your product.

I recommend focusing on vision, micro, and qualifying demos in webinars. I also recommend that you combine the vision and micro demo into one webinar (which would include an introduction to this product or an introduction to the company and the main value proposition) followed by a very brief product demo. Later in the month do a standard product demo webinar, which is a deeper dive demo in the product.

KPIs: How Do We Measure Scaling Progress?

To complete our scaling strategy we need to measure our progress. Here are some ideas for types of key performance indicators (KPIs) that could be helpful when trying to verify that you're making progress towards meeting the increasing demand with existing resources.

- Avg demo requests per sales rep (any of 6 types)
- % of time SCs spend on key activities
- AE:SE ratio (should be increasing)
- # of Video Demo Views
- Video Demo View Time
- # of Stakeholders Discovered through video demo
- # of Video demos sent by AEs / BDRs
- # of live Vision or Micro demos done by AEs/BDRs
- # of participants attending webinar demos

Are the average demo requests per sales rep increasing or decreasing? Are you getting fewer requests per rep, meaning more of it is being handled in other ways?

Next is the percentage of time that your solution consultants spend on key activities. Lacking any more sophisticated system, I recommend that once a month, the team does a self-analysis in a survey. Are key activities increasing? Do they have more time to spend on them?

Another KPI to look for is the AE to SC ratio. This ratio actually should be increasing because if you're truly scaling the team can handle more demand per SE. By itself, obviously, this KPI does not help us in isolation, but in conjunction with other KPIs it can be very helpful.

If you choose to use interactive video demos, you should look at the number of video demo views. Theoretically, every demo video view is one demo that a sales engineer didn't have to do. Also look at the amount of demo view time. Some of our customers look at this as a direct time savings KPI.

Another important KPI is the number of stakeholders discovered organically through video demos as people share your video demos with other colleagues in the target organization. Make sure to use software that can track what video demos are shared with whom.

Also look at the number of video demos sent by AEs and BDRs. Obviously you want to make sure they are getting viewed, so the view rate is also important.

For tracking progress delegating, track the number of live vision or micro demos delegated and delivered by AEs or BDRs.

Finally, track the number of webinar attendees as well as amount of total time spent by webinar attendees.

Combine these metrics together and you'll get a comprehensive view of how much productivity increases you are getting through your scaling strategy.

In Conclusion

In summary, to scale presales is to implement strategies that will achieve exponential output with existing resources. First, analyze the “increasing demand” gap. Then identify what activities could be candidates for elimination, automation, or delegation by conducting the “key activity” gap analysis. Once you know what key activities you want to increase and which non-key activities are candidates for scaling strategies, apply the principles of ELIMINATE, AUTOMATE, and DELEGATE.

What do we want to eliminate? The under-qualified demos through better qualification and implementation of the DQL (Demo Qualified Lead) lead qualification stage.

What do we want to automate? We want to automate all repetitive demos that can be handled by automation technology. What types of demos are good for automating? The vision, micro, qualifying “standard” demos as well as FAQ and closing demos—essentially all the demos types except that deeply technical custom demo.

Finally, delegate vision and micro demos to AEs and BDRs if possible.

The last principle is the principle of tradeoffs. What are we saying No to? We are really saying No to doing all demos with live SEs. But one of the things that we're saying Yes to is a better client experience—they get what they need more quickly. Also, sales teams get what they need more quickly. We're also saying YES to efficient use of resources, better margins, and sales engineers who are doing more of what they love to do and are uniquely qualified to do, resulting in less burnout.

About Consensus

At Consensus we help sales engineering teams reduce wasted time doing repetitive unqualified demos so they can do more of what they do best: solution consulting. Sales engineers everywhere struggle with increasing demand for demos. Consensus was recognized as a Gartner Cool Vendor in 2019 and is the leader in demo automation software that makes it easy to create, send, and track interactive demos that the sales team sends out on-demand. Consensus automatically personalizes the experience and tracks engagement, bringing prospects to live demos better educated and ready to talk specifics. Learn more at www.goconsensus.com.



About the Author

Garin Hess is a serial entrepreneur whose entire career has been in software, including in several roles acting as sales engineer. He has founded multiple software companies, industry conferences, and a non-profit organization. He is currently the founder and CEO of Consensus, an award-winning B2B demo automation platform. He enjoys reading history, mountain biking, playing tennis, choir conducting, and spending time with his wife and three children.