Tech at Sales Meetings

Getting the best out of us at meetings with prospects

We want to help ...

Sales drive revenue

Revenue drives growth and pays salaries

Tech wants to see growth, and have our salaries paid, just like everyone else

… but we have different immediate objectives ...

Sales needs to sell the product

Tech needs to deliver the product

Neither one works without the other

… and we work differently

Meetings (with the prospect) drive sales

Meetings (with anyone) hinder delivery

Tech is busiest when our diaries are empty

Inviting tech to sales meetings

The bottom line: if the meeting is crucial to the sale and the only time it can happen is 2pm tomorrow then we'll figure something out for 2pm tomorrow.

But: most prospects realise tech time is scarce and valuable (if it's not we're overcharging for the product) and most genuine opportunities won't fail if the tech meeting doesn't happen at one specific time on one specific day

So:

- Get a few options for times
- Ask us which works best
- Confirm only once we've figured out who is free and when

Timing

Mid-morning or mid-afternoon meetings kill delivery: you have to abandon what you started and try to pick it up again later. You know what it's like when a sales meeting is interrupted by people joining or leaving halfway through.

Picking a slot just before lunch, just after, or late afternoon is much better than mid-morning or mid-afternoon

Back-to-back meetings that take out an entire afternoon or morning are sometimes better than several consecutive days with one meeting

If the meeting is a general sales meeting but with one or two specific tech questions can we come in at the beginning or the end just to deal with those?

Asking

The more precise you are about what you need, the easier it is for us to figure out who can help. "Someone from tech" is pretty broad …

What areas of the product are being covered? Is there someone who has previously been good on a similar call?

Confirming

Make sure a meeting gets booked with the attendees invited and the call/meeting details included.

This might be the most important event of your week but it is unlikely to be ours. I've been known to forget about a meeting I was invited to earlier that day because it wasn't in my diary

Getting the most from tech in the meeting

If you need tech at a sales meeting it is likely to be for a specific reason so make sure we understand that reason:

- What is the background to the opportunity? What are we proposing to sell? What sort of company are they?
- What is the objective? Other than 'a sale' what are we trying to achieve with this meeting?
- What is the agenda? What specific questions or general areas need to be addressed?
- Who is attending?

Background

We sell to a wide range of customers and Tech has to deal with those variants in a way that Sales doesn't. It's useful for us know whether the customer is a bank or an IRP, large or small, proposing to use all the product or just some of it, considering alternatives or only looking at us.

Objective

Is this just about answering specific questions or more broadly about demonstrating credibility and knowledge? Are there things we need to find out from them?

Are you expecting us to be able to do anything as a consequence of the meeting? If they just have a few brief questions about our technology, and then you later ask us to estimate how difficult integration with their existing infrastructure is, we're not going to be able to answer and will need another call.

Agenda

It might be a stereotype but it's a stereotype for a reason: tech people don't generally like rocking up to a meeting unprepared and winging it from there. If the prospect's tech team are present, more than likely they will have written down what they need to know so make sure we have a copy. In the absence of that make sure there is a structured agenda with all the topics to discuss on it.

There is little I hate more than being ambushed by a bunch of well-prepared techies asking questions I'm not in a position to answer.

Attendees

It just helps to know who you're going to talk to. I might be nervous about addressing their CEO and CTO directly but I'd rather know about that before the meeting than find out when they walk in.

We're on the same side, we want the same things

But we go about it a bit differently from you