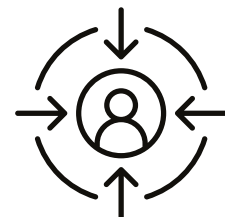


Discover, Qualify Hard, Tell the Story, Listen and Stay Honest

Curiosity is your superpower. You own the outcome, act as a trusted advisor, keep the buyer at the centre, prepare well for every meeting, stay honest and straightforward, and treat every deal as an opportunity to learn and become better.

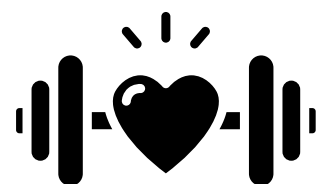
Core mindset and training habit



You love discovery and curiosity



You genuinely care about understanding. You practise active listening and always keep an open mind.



You train on purpose

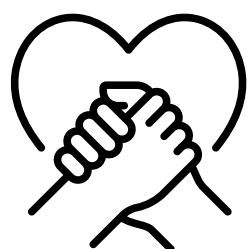
Talent isn't enough. You see yourself as a professional who trains as hard as an athlete, embracing tough feedback and practice to improve. You dedicate regular time to learning and training, reviewing recordings, and seeking feedback.

80% on deals / 20% learning

Honesty builds Trust

You prioritise trust over short-term gains and are transparent about limits, risks, and uncertainties.

You treat competitors, partners, and internal teams with respect. In practice, this means acknowledging when you don't have an answer and committing to finding it, avoiding overselling features or timelines, and considering implementation and adoption during the sales cycle.



Why?

If you don't truly believe in what you're doing, your client won't either.

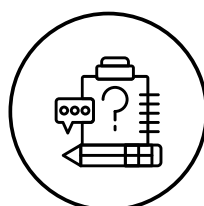
You show interest by asking about their processes, challenges, impact, and people, not just 'requirements'.

Ask why, why now, so what

Buyer Centric

You recognise that buying enterprise software is challenging and guide customers through their journey.

You communicate in terms they understand: business, risk, politics, and change. You know their current stage and next steps, providing helpful slides, recaps, and examples for their internal storytelling.



You always debrief and learn

Every meeting and deal is an opportunity for improvement. Wins and losses are data, not ego. Be strict with yourself, but not cruel. After calls, reflect on what worked and what didn't.

Selling as one

You view PreSales as a collaborative effort, recognising that winning significant deals requires teamwork with sales, product, services, partners, and customers. You prioritise alignment and communication, actively engaging with sales before and after key meetings. By involving experts early and connecting people, you foster collaboration rather than creating silos.



Sales Cycle

Prospecting → Sales Discovery → Functional & Technical Discovery → Product Demonstration & Workshops → Service Discovery → Negotiation → Closing → Onboarding

(always qualify, always add value, always proactive to enable your Coach/Champion)

Commit fully or step back.

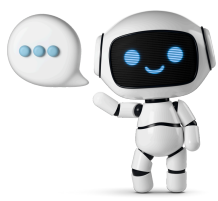
Be straightforward and authentic in your communication; there's no need to sugarcoat things. Firmly saying no can sometimes be a strong stance for both you and your client or team. However, always remember to approach situations with humility and a willingness to listen.



Calm resilience

Stay calm and resilient through the chaos, which involves long cycles, politics, shifting priorities, and last-minute requests. Maintain composure during stressful situations, embrace change, and view setbacks as a normal part of life rather than a personal failure. In practice, don't react emotionally on calls—take a moment to breathe before deciding how to respond.





Discovery & Qualify



PreDiscovery

Prepare for the discovery (use AI). Note down 3-5 assumptions about their situation and 3-5 key questions to ask. Align with sales on attendees, speaking order, and desired meeting outcomes. Think about the give-get framework.

Discovery

Discovery is key to winning or losing a deal. Listen 80% and talk 20% of the time. **Situation:** How do they currently work? **Problems:** What is slow, risky, or costly? **Impact:** What are the costs in time, money, and customer experience? **Desired Outcome:** What does success look like in 6 to 12 months? Also, inquire about roles, systems, timelines, and success criteria. Avoid interrupting. Use follow-up questions like "Can you tell me more about that?" Confirm understanding by summarising their pain points: "So, if I understand correctly, the main issue is..." You've succeeded if you can explain their situation in 2 to 3 sentences, and they affirm, "Yes, that's exactly it."



Discovery Follow up

This is the golden hour. After your discovery meeting, clean your notes and group in the OSD. Send a brief recap highlighting what you heard, understood goals, open questions, and proposed next steps.



Qualify early, Qualify Hard and never stop Qualifying

You don't chase everything. You value your time, your team's time, and the customer's time. In practice, you continually assess need, urgency, budget, decision power, and fit. You're honest with sales about low chances or weak fits, focusing your efforts on deals where you can truly help and succeed.

Questions (5-Why Technique)

- | | |
|--|--|
| What steps do you expect between today and a final decision | What is hardest or most frustrating about how you work today |
| What are the top 3 priorities for your business this year | What have you tried so far to solve this problem |
| What does this problem cost you today in time, money or risk | Where does the data come from today and where does it need to go |
| Who cares most about solving this problem | How will you know that this project was worth the effort |
| If you had a magic wand and could fix 2 things in this process, what would they be | Who is involved in this process and what do they do |
| Where do you see the most manual work or friction today | What work related issues keeps you up at night? |
| If I describe your situation back to you, can you tell me if I got it right | Walk me through how you handle this today, from start to finish |

Demonstration & Workshops

Tell the story - Use the picture pitch in combination with the persona use case based approach.



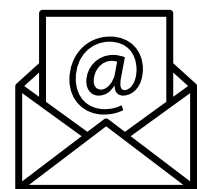
Pre-Demo

A great demo is 70% preparation. Before starting, review your discovery notes and select 3 to 5 key use cases. For each, identify the problem it solves, the user role, and the expected value. Prepare relevant data or scenarios that reflect their reality. In one sentence, you should be able to say, "This demo will show how we help them go from X to Y in these 3 main areas."

Demo (3 not more use cases)



In the demo, begin by highlighting their main goals: A, B, and C, and how your solution supports these objectives. Walk through a typical day in the user's life (persona-based). Use clear, straight-forward language and connect your points to their metrics and risks. Ensure the demo aligns with their processes, stay calm when addressing questions, and if you don't have an answer, acknowledge it and follow up later. Use the Sales as the moderator. At the end, summarise by outlining three key pains and three ways your solution helps. Always end with the next steps.



After Demo

Take note of the questions asked, reactions observed, and any new information learned. Identify who was engaged, who remained silent, and who expressed criticism. Update your OSD and CRM. In your follow-up, include a recap of their goals, what you presented and how it helps them, and answers to any open questions. The aim is to transform demo energy into real progress, beyond just having a "nice meeting."



Simplifying complex topics and bridging the gap between business and technology. By creating clear and engaging stories from intricate ideas, you utilise simple visuals and examples, always summarising why something matters in one or two sentences.