



# **How to Succeed in Sales Engineering: Tips from a Seasoned Professional**

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# Agenda

- Basics
- Activity
- Strategy
- Accounts
- Account Identification
- Contact
- Network
- Styles
- Coach
- Investigate
- Resources
- Tools
- Database
- Funnel
- Remember You
- Price and Competition
- Etc.

# Basics

- Confidence
  - Know your Products and Customers
  - Speak with Authority
- Be Prepared
  - Elevator Speech
  - Review Cards
- Comfortable
  - “Where else can I get paid to hang out with my friends?”

# Basics

- Consultative
  - People Like to Buy, but do not Like to be Sold
  - Explain, Suggest
- Honesty/Ethics
  - Know Your Boundaries
  - Feel Comfortable to Say “I do not know.”
  - Never Make it up
- Stop Talking and Listen
  - You have 2 Ears and 1 Mouth

# Basics

- Identify
- Meet
- Qualify
  - Technical Need
  - Funding
- Present
- Demonstrate
- Quote
- Follow Up
- Close
  - Remember to Ask for the Order!!!

# Activity

- 4 Visits per Day
  - Long Introductory Meetings
  - Short Follow-Up Meetings
  - Presentations
  - Demonstrations
- 4 Days per Week
- One Office Day

# Strategy

- Area
  - Zip Code Range
  - County
  - Office Park
- Accounts
- Technology
- Product

# Accounts

- A Accounts
  - 3 to 6 Key Accounts
  - Account for 50% of Business
  - Visit Weekly to Monthly
  - Fully Understand Organization
  - Stay Abreast of Company News



# Accounts

- B Accounts
  - Approximately 12 Major Accounts
  - Account for 30% of Business
  - Visit Monthly to Quarterly
  - Identify Major Departments, Personnel and Projects

# Accounts

- C Accounts
  - Remaining Accounts in Territory
  - Account for 20% of Business
  - Make Contact

# Account Identification

- Chain of Command
  - Key Technical Contact
  - Key Decision Maker
  - Key Purchasing Contact
  - Key Deal Breaker
- Know Who Will Support or Obstruct You

# Contact

- Try to Be Exposed to All Your Customers  
Once per Month
- Visit
  - Lunch, Dinner, Entertainment
- Call
  - Try Different Days, Times
- E-Mail
- Mail

# Network

- Family
- Friends
- Neighbors
- Community and Church Groups
- Your Children
- Professional Societies-IEEE
  - Meetings
  - Seminars
  - Conferences
- Current Customers

# Styles

- Be Yourself
  - Find What Works for You
- Focus & Diversify
  - If It Works, Continue Doing It
  - Experiment with New Methods
  - When in a Slump, Rethink Your Methods

# Coach

- Give and Take
- Favors
- Available for Visits in Emergency
- Information
- Try to Talk Away from Company

# Investigate

- Web
- Find one Contact, then Network
- Identify Products, Programs and Projects
- Identify Departments
- Go into Lab
- Ask Who Else
- Never Assume



# Resources

- Applications Engineers
- Account Managers
- Management
- Seminars
- Lunch & Learn
- Learn from Customer Presentations

# Tools

- PC
  - Database
  - Office
- Smart Phone
  - Database
  - Contacts
  - Calendar
  - Text
- Tablet
  - I do not use-I still use paper
  - Data Sheets
  - Drop Box
- Car
  - Look successful, but not like a crook
  - Room for customers and equipment

# Database

- Electronic Database
  - ACT
  - SalesForce
- Contact Information
- Organizational Information
- Technology Information
- Product Information
- Notes

# Funnel (Forecast)

- Keep Track of Projects and Quotes
- Use for Follow Up
- Typically 20% to 67% Close
  - I use 20% (To book \$2M you need to forecast \$10M)
- Probability Percentages
  - 90%: Technically Approved, Funded and In Process
  - 75%: Technically Approved and Funded
  - 50%: Quoted and Likely to Occur
  - 25%: Quoted, but Outcome Unknown
  - 10%: Projected, but not Likely to Occur Soon
- Fill the Funnel

# Remember You

- Business Cards
- Name Labels
- Tokens
  - Magnetic Business Cards
  - Personalized Pens
  - Personalized Note Pads
  - Calendars
- Visit, Call, E-Mail, Mail

# Price and Competition

- Sell Features, Advantages and Benefits (FAB)
- Know Competitive Pricing
- Be Prepared
- Do not Engage in Negative Selling
- Understand the Application
- Highlight What you Offer Respective to the Requirement
- Do not Sell on Price
- Your Price is Based on Performance, Quality and Reliability
- Discount Now-Discount Forever
- Discount on Quantity
  - Blanket PO
  - Commitment Up-Front to Quantity
  - Extend Delivery

# Etc.

- Follow Service Issues
- Make Something Good of Something Bad
- Capitalize on Success
- Learn from Mistakes
- Carry Forecast
- Follow Up Reminders in Database