

Software Presales

Duration: 3 day, 8 hours each day

Overall Training Objectives

By the end of this 3-day program, participants will be able to:

- Explain the presales function and where it fits within the software sales cycle.
 - Run structured discovery and qualify opportunities using a recognized framework.
 - Prepare and deliver tailored, persona-driven product demonstrations.
 - Handle live questions, objections, and competitive situations with confidence.
 - Scope and run POCs, pilots, and trials that lead to a clear decision.
 - Respond effectively to RFPs and technical, security, and architecture questions.
 - Articulate business value and support the account executive through the close.
 - Execute a clean handoff to implementation / customer success.
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Day 1 — Presales Foundations & Discovery

Module 1: The Presales Function

- The sales engineer / solutions consultant role
- Presales vs. sales vs. post-sales
- How presales fits with AE, product, and customer success
- Presales success metrics (technical win rate, POC-to-close, influenced pipeline)

Module 2: The Buyer & the Sales Cycle

- The modern B2B software buying journey
- Key personas (economic buyer, technical buyer, champion, end user, blocker)
- Buying committees and internal politics
- How buyers evaluate software

Module 3: Discovery Fundamentals

- The purpose and mindset of discovery
- Effective questioning and active listening
- Uncovering pain, business drivers, and desired outcomes

- Separating requirements from "nice to haves"

Module 4: Qualification Frameworks

- Overview of common frameworks (BANT, MEDDIC/MEDDPICC, SPICED)
 - When and why organizations use them
 - Qualifying vs. disqualifying
 - Documenting a discovery summary
 - *Practice*: role-play discovery calls with feedback
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Day 2 — Demonstrations & Technical Storytelling

Module 5: Demo Principles

- Relevance over feature dumps
- The "demo narrative" arc
- Tailoring to persona and pain
- Show-don't-tell techniques

Module 6: Demo Preparation

- Demo environment setup
- Realistic data preparation
- Scripting vs. improvising
- Rehearsal and contingency planning

Module 7: Delivering the Demo

- Opening and framing
- Pacing and time management
- Handling live "can it do X?" questions
- Managing objections and interruptions

Module 8: Advanced Demo Situations

- Multi-stakeholder demos
- Remote vs. in-person dynamics
- Competitive "bake-off" demos
- Differentiation and messaging

- *Practice*: deliver a scoped demo with structured peer and instructor feedback
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Day 3 — Technical Validation, Value & Closing

Module 9: POCs, Pilots & Trials

- POC vs. pilot vs. trial (when to use each)
- Scoping and defining success criteria
- Managing execution without scope creep
- Go/no-go and exit criteria

Module 10: RFPs & Technical Objections

- Responding to RFPs/RFIs efficiently
- Security, compliance, and architecture questions
- Involving the right SMEs
- Handling technical objections and risk concerns

Module 11: Business Value & Closing

- Building and defending ROI / business value
- Collaborating with the AE to advance the deal
- The technical close and final objections
- Handoff to implementation / customer success

Module 12: Professional Skills & Capstone

- Presentation and communication skills
- Managing product knowledge and continuous learning
- Working across internal teams
- *Capstone*: end-to-end mock deal (discovery → demo → POC plan → value case → close) with evaluation