

# **Jana Technology Services Sales Engineering Charter**

## **Objective**

Sales Engineering is the key technology function within the Jana Sales organisation, responsible for leading all the technical pieces of the sales campaign and developing technical level relationships in an account.

## **Pre-Sales Engagement**

When our Sales Manager identifies a new opportunity and pre-sales support is required, the Sales Manager requests support from the Sales Engineering Manager. It is expected that the opportunity is a 'Jana Sales Lead' as defined by the Jana Sales Process i.e. :

- That initial qualification has been carried out
- That the Sales Manager has identified business sponsor
- That the Sales lead has budget and an identified timeline

The Sales Engineer becomes the technical owner for the opportunity and reports to the Sales Manager.

It is the SA's responsibility to be aware of all sales activity to ensure that, in conjunction with the Sales Manager when required, appropriate levels of technical resources are balanced and applied to the opportunity based upon business & sales goals. Sales goals reflect the way in which sales are measured by the company and specifically means the size of an opportunity, the clarity of the sales objectives and process for an opportunity and the likelihood and timing of closure

The Sales Manager and the SE are established as the two-man team for the opportunity. The Sales Manager has sales accountability and is responsible for the sales strategy in conjunction with the SE. The SE is responsible for technical pre-sales work. It is expected that the SE can perform the following sales activities for opportunities.

- Present the sales strategy at any point in time. This includes all current activity and issues which are outstanding.
- Able to present the opportunity's status at any point in time (forecast, size, etc.).
- Cover the day to day sales activity whilst the Sales Manager is away, engaging the VP Sales as he sees fit.

The SE always owns the technical sales activity and is therefore responsible, in discussion with the Sales Manager, for engaging and managing technical resources to support the sale. The SE works with the Sales Manager and the JPS Director to satisfy the technical resource requirements.

## Customers and Suppliers

### **External Customers**

End Users	The SE is motivated to sell relevant client licences and services to end user customers.
SI	The SE provides support to the SI so that it is effective in selling projects which use the client technology to end user customers, and to help the SI prepare for delivering such projects.

### **Internal Customers**

Sales Director	The SE delivers the services to support sales campaigns to enable the Client organisation to achieve their objectives.
Sales Manager (Account Manager, Salesman)	With the Sales Manager, the SE forms the two-man sales team for an account opportunity delivering the services necessary to turn an opportunity into a sale.

### **Internal Suppliers**

Professional Services (JPS)	Provides specialist technical resource (such as for meetings and to support the implementation of POT / POC's), project scoping and project definition resource as part of the overall solution sale definition. Also detailed solution architecture expertise.
Product Marketing	Provides technical presentation material, technical collateral, technical positioning and objection handling information, technical reference guidance, product release information, schedules, roadmap. (The SE provides technical feedback of customer's needs in these areas.)
Other Sales Engineers	Provides specialist skills and additional technical resource to a situation or opportunity, including POT's /POC's and architecture work.
Customer Support	Provides resolution to the customer's issues with client products under the priority and guidance of the SE, as appropriate to sales objectives.

## Services Offered

In providing services, the SE is responsible for:

- Working to achieve the relevant client's business objectives.
- Presenting the client as a high quality organisation.
- Demonstrating flexibility and responsiveness to customers in response their demands.
- Asserting the client's proposition as a high value player in the solution space.

## **Sales Engineering**

Sales Engineering offers and is accountable for the following activities:

- Working with the Account Manager to define and develop the sales strategy.
- Understanding the prospect's requirements, defining a client solution to them and be able to sell the value of the client solution.
- Articulate and debate the client proposition against their architecture and business requirements.
- Manage customer expectations to realise the client value proposition.
- Managing the technical relationships between the client and Partners, where involved, to support an opportunity.
- Presenting the client technology.
- Leading discussions with the customer on architecture and the application of automation to the customer's business.
- Demonstrating the client products.
- Building simple applications in the clients technology. Often occurs at demo stage in sales cycle.
- Engaging technical resources from the suppliers for meetings requiring specialist technical knowledge, support in project and solution sales, and proof of concepts.
- Engaging resources from JPS to define and scope the project component of an overall solution.
- Owning the delivery of the technical proof points in a sales campaign.
- Transferring ownership of the solution for delivery to the systems integrator (or JPS) after deal closure.
- Performing the technical account management role for accounts, as assigned by the Sales Engineering Manager.
- Provide technical sales support and training to Systems Integrators.

### Understanding Terms

POT – Proof of Technology – A 2 to 3 day maximum exercise in which a small slice of a system is built with specific proof point to prove that the technology can work in a customers environment. This is as directed by the client often occurs at a defined point in the sales cycle.

POC – Proof of Concept – Chargeable amount of work as directed by the client, often to prove a business case, that occurs towards the end of a sales cycle. Again proof points must be defined.