



**Peter E. Cohan**

The Second Derivative

1532 Scenic Drive

Trinidad, CA 95570

T: +1 650 631 3694

E: [PCohan@SecondDerivative.com](mailto:PCohan@SecondDerivative.com)

W: <https://GreatDemo.com>



## **COVID-19, Presales, and Leadership**

Presales practitioners *as* leaders.

This is a critical time for presales folks to leverage their trusted advisor status to lead and guide our customers in operating and communicating over the web. Let's step up to this challenge!

### **COVID-19 and Sheltering in Place**

The world is uncomfortable and concerned. Non-essential organizations are operating remotely. Most of our customers have moved to home offices – new environments for many.

And these new home offices are often hastily erected – a pundit offered that someone had set up a laptop on an ironing board, as the only horizontal surface available!

There are distractions at home – children, for many, require more face time. Dogs and cats don't understand that a conference call is taking place. Sounds from cooking, cleaning, kids playing, noises from neighbors and conversations in other rooms are new background sounds in the business world for many.

In moving to home offices, customers have lost their *ad hoc* office workplace discussions and hallway interactions. They are uncomfortable and concerned.

### **COVID-19 and Presales Practitioners**

While we are also uncomfortable and concerned, many presales folks have been working at home for years. Comparatively speaking, presales people are way ahead of the curve.

We are comfortable with home offices – we know the rhythms and the routines. We know how to deal with the distractions and the challenges of operating remotely.

We are familiar with using Zoom, WebEx and GoToMeeting. We have our offices set up with our headsets, phones, routers, power-strips, printers, etc. – and have organized to operate smoothly based on years of experience, in many cases.

For most customers, however, this is new – it is uncomfortable and troubling. We need to guide our customers through this transition – we have the experience.

### **Time to Lead!**

This is a time for skilled presales folks to take the lead and guide our customers in remote operations and communications.

You are likely more skilled and more experienced in remote meetings than your customers. Accordingly, take the lead in guiding the interactions with your customers.

Help them learn effective use of web collaboration tools – offer informal training sessions. Offer suggestions on how to best set up their home offices. Teach them how to use online whiteboards, guide them through Discovery conversations using those whiteboards. Offer tips on how to improve their office lighting for their webcams.

Share the insights you've learned working from home over the years. You are then truly being a trusted advisor.

### **Patience**

Many of us know that working over the web takes longer than face-to-face for many functions. It takes time for everyone to join a web meeting. It takes time to start sharing a screen over GoToMeeting. It takes time to deploy and use annotation tools in Zoom. It takes time to organize break-out rooms in WebEx.

It takes time for people to remember they have muted themselves...!

So have patience – and ask for patience. Everything is likely taking a bit longer than before – and can be a bit of a struggle for some.

When you launch a web meeting, go through a [checklist](#) to make sure that everyone is connecting satisfactorily and that communications will be as effective as possible.

When you are doing Discovery, take a moment to open a whiteboard and teach your customer how to draw – then erase and let them diagram their processes.

When you are doing a demo, tell your audience, “Hang on, let me grab an annotation tool...” to highlight a key portion of your screen. Let them know what you are doing!

When you are assisting a customer with a POC task, help them share their screen so that you can see what they are doing – and guide them through the steps.

When you are discussing a Value Realization Event, build a whiteboard together to map out the rough implementation timeline, go-live date, and target Value Realization Event.

It can all be done over the web, but it will be more challenging. We need to lead and guide our customers. And we need to have patience and to ask for patience.

### **The Conversational Conduit**

You, as presales, are likely the most skilled in your company to be the Conversational Conduit between your company and your customers.

Presales folks are amongst the most intimate with our customers' situations – their needs and desires, their goals and objectives, their challenges and constraints. You know their software infrastructure and environment, you know the other tools they use, and you understand how they consume your software.

You have been communicating with a broad range of customer job titles – often including members of the C-Suite, senior managers, middle managers, front-line managers, staff members, administrators and assistants.

And these people see you both as a resource and as someone who has their best interests at heart. You are a trusted advisor.

Accordingly, you are likely best suited to continue the conversation, remotely, with your customers – and to serve as a communications pathway between your organizations.

This is a privilege, an honor – and an opportunity to lead!

### **Be Human**

Connecting over the web can be colder, more awkward and more uncomfortable than face-to-face. Let's improve the experience!

When you start a web meeting, turn on your webcam – and encourage your customers to turn theirs on as well – let's humanize the meeting.

If this is the first time you've met these folks, do a virtual handshake – or virtual elbow bump – with each person, just as you would when you meet face-to-face.

For people you've worked with previously, smile and wave to your customer as you say "hello". Compare shut-in experiences. Share tips you've learned on how you and others are coping.

As a break, or between multiple sessions, take your customer a virtual tour of your office, using your webcam. Take it outside and share a view of your yard/garden and the current weather. Humanize the experience!

### **Tool-Up and Up-Skill**

If you are not fully experienced with using Zoom, WebEx, GoToMeeting and other tools – or don't have the tools you need, get equipped and get skilled!

Get a good, clear headset for your verbal communications. Confirm that your voice isn't getting "clipped" due to bandwidth issues. Test to remove echoes.

Acquire an online whiteboarding tool if you don't already have one.

If you are using Microsoft Teams or similar tool for your demos, get ZoomIt or an equivalent so that you can annotate during demos.

And if you have rarely or never used the annotation tools, whiteboards, breakout rooms, and other capabilities in your web collaboration tool, [get experienced!](#) Set up a session to learn how these tools work and practice using them – it is no longer sufficient to simply click and talk.

### **The Leaders of the Leaders – Equip, Enable, Empathize, and Coach**

How can presales management support their teams – and develop and enable the leadership we are describing? Very simply: by helping your team tool-up and up-skill.

Ask them, "what do you need to operate effectively from your home?" Based on your experience, are there other tools, equipment or recommendations that they are missing, or haven't considered? Make sure they are fully equipped for the next several months.

Ask them, "What training do you feel you need to work from home? Where do you feel you could improve or have gaps?" Similarly, suggest resources for training to fill these gaps and others that your team members may not have contemplated.

Equally important, reach out to the team both as a group and on an individual basis – regularly. For folks who previously worked in offices, this will be even more important. Consider virtual after work sessions – virtual happy hours, for example – to let people "blow off steam" and socialize.

Check-in more frequently with individuals – this is a period where people are stressed and worried. Show empathy – after all, it is likely that you are just as stressed and concerned as the folks on your team!

Coaching during this crisis is critical – both to help your team improve their practices and, frankly, to maintain morale. Do virtual ride-alongs over Zoom/WebEx/GoToMeeting of Discovery calls, customer check-ins, demos, POC meetings, and also consider joining some of the interactions between your team and other departments of your company, and third parties.

Inspect, assess, coach. Tools like Refract and Gong provide terrific mechanisms for remote – and asynchronous – coaching to take place.

### **COVID-19 and Software**

Software is a critical key to surviving and ending this crisis.

Software is enabling us and our customers to continue to work at home – think about that!

We, as a world population, are running much of the world from home, via software. Right now, the world is relying on software – software for manufacturing the essentials, software to operate supply chains, software that enables remote communications, software that enables our customers to keep their businesses running, and software to find drugs, new cures and ultimately vaccines to beat COVID-19.

### **Our Role – Our Responsibility**

Accordingly, our role in presales is perhaps even more important than before.

We help our customers articulate their needs, define solutions, evaluate options, confirm capabilities, understand implementation – and realize value from their software purchases.

We communicate our customers' goals and objectives, constraints, challenges and future desires back into our organizations.

We are, more than ever, the critical conversational conduits, guides and leaders in the world of software. It's time to lead!

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