Podcast Script - CRM for SEs

Welcome to this sixty second Sugar snippet. My name is Jenny Ho and I'm a Sales Engineer here at SugarCRM. Today we're going to talk about Customer Relationship Management, or CRM, for Sales Engineers.

Sales Engineers are those hard-working technical gurus who assist sales people in closing deals. Typically, SEs are the technical experts of the sales team; they may demonstrate the software or hardware, answer architecture questions, meet with the prospect's CIO, or develop a prototype of a proposed solution in order to help close the deal.

So how can an SE effectively use a CRM system? For starters, since one SE covers so many accounts, it's tough to remember the details and nuances of every customer. Using the "Notes" section of the opportunity screen allows the SE to jot down useful notes regarding the prospect's technical environment, and to refer to those notes if the SE isn't continually engaged in that deal. Those notes can be enhanced as the SE develops more details about the proposed solution.

Often, SEs are brought into a deal at the last minute; once again, the Notes area can be a great place for the SE to quickly learn the specifics of the deal. This means the sales rep needs to do a good job documenting the sales opportunity, by including any emails, notes about the account, or Requests for Proposals that have been distributed. The SE can step into the deal quickly and efficiently.

A best practice is to put a summary of every meeting in the CRM system so that the details aren't lost over time. Also, Technical Support and Implementation personnel can read through the notes after the sale to better understand what was discussed regarding the environment and use of the system, which saves the customer from having to explain everything to the support rep again. The end result is a smooth handoff from Sales to Implementation to Support.

SEs can also leverage the CRM's Tasks section, to log follow-up items after the meeting has ended. The Documents area can store proposed technical layouts of the solution that were created by the SE. SE managers can use the reporting tools to determine which SEs have been involved in which sales deals. By tying an SE to a sales opportunity, it's much easier to demonstrate how much business that SE helped close, which in turn gives the SE more justification for asking for that big raise!

Finally, adding the SE to the sales team, using the "Team" capability of the CRM tool, helps keep the SE in the loop on all aspects of the sale. Knowing the "big picture" helps every team member work together to close that opportunity with a Win.

And that's your sixty second Sugar snippet. Goodbye!