

Whether you call them sales engineers, systems consultants, sales support analysts or systems engineers, winning deals depends on the efforts of the technical pre-sales team. Sales engineers (SEs) can mean the difference between victory and defeat. String enough victories together and you have a flourishing product. In my experience, successful SEs share a number of qualities that can help ensure success.

There is no SE who meets every ideal criterion. In fact, some of these ideal skills can conflict. An SE who is extremely diplomatic may not be competitive enough to help win deals. Another may be so confident that she ignores the need to keep her technical skills sharp. That said, there are several important traits that you'll want your SEs to have before joining your team.

1. Competitive. In a crowded market, the technical sales process can be cutthroat. The ideal SE takes a deep, personal interest in winning. He doesn't like to lose to anyone, much less to a competitor with an obviously inferior product. He will do whatever it takes to win the business. This may mean late nights installing his product at the customer site, providing ad-hoc training to the potential users and impressing executives of the need to choose his technology. SEs who are not so competitive may take a more relaxed approach to the deal, figuring that the sheer merits of the technology are sufficient to prevail. This is a sure recipe for loss. Competitiveness can be a double-edged sword, however. Some SEs are so driven that they engage in political machinations within their companies. This can lead to decreased team morale.

2. Technically skilled. An ideal SE will possess a good measure of technical knowledge in your industry. Some will have learned a technology as users or developers in an IT shop. Some will have represented competitive products at other companies. If your company produces sales automation software, you may find an ideal SE candidate from a firm that produces relational database products. A good SE will be able to quickly master a new technology; in fact, the most effective SEs delight in picking up new skills and relish the challenge.

3. Inquisitive. An SE who enjoys learning new technologies will be a

joy to have on your team. An inquisitive SE won't view the necessary training on your product as a chore but will understand these new skills are a prerequisite of her job. Indeed, any new skills simply make her more marketable. This also means that good SEs take an interest in the industry, reading trade publications and applicable Web sites. Training can play a big role in bringing a new SE up to speed, but there is no substitute for intellectual curiosity.

4. Confident. Confidence is one trait that cannot be provided through training. Some people, via DNA or life experiences, possess a strong sense of self-confidence. In a technical pre-sales role, this is vital. SEs will often find themselves in front of potentially hostile audiences, from unsmiling executives in dark suits to sceptical middle managers to jeering technical wizards. Each audience views the SE as an inferior. The executives view the SE as a peon attempting to extract large sums of money from the firm. The middle manager views the SE as a technician. And the technical staff may view the SE as an impostor, incapable of understanding the intricate architecture that the wizards have built. The SE must be able to overcome the natural instinct to flee in terror. Instead, he will use his confidence to face whatever challenges lie ahead.

5. Articulate. A large part of the typical SE's job is to give presentations and the classic "dog and pony show." A successful SE will be able to explain, as clearly as possible, the benefits of his product or service. Customers and prospects also need to be informed of your company's vision. If an SE is so technical that she can't relate your business strategy, your product and company may be relegated to the "technically interesting but no future" category. Customers rarely buy products marked with this label.

6. Diplomatic. When you're asking someone to spend a great deal of money, technical pre-sales requires a significant amount of tact. This is complicated by the fact that SEs are teamed with sales representatives, who are often known for mercurial temperaments. A good SE will be able to tell his sales rep, tactfully, there is no way a particular deal will happen. Likewise, the SE should have the communication and political skills to placate or bypass someone on the prospect's staff who may have excessive prejudices against his product. Diplomacy is partly learned and partly innate. SEs who are so sure of their own business and technical skills can come across as haughty and aloof to prospects. In many cases, these prospects will go out of their way to "teach" the SE (and your company) a lesson in humility, even if your product makes the most sense.

7. Self-managed. Many SEs work in remote field offices, with a minimum amount of oversight. While few would argue about the benefits of having their manager three time zones away, some people aren't comfortable with so much leeway and lack of feedback. Fortunately, because SEs are teamed with sales reps, this can compensate for the lack of structure. However, a successful SE will be able to set her own schedule, balancing the need for customer presentations, product installations and self-training. If she isn't confident or mature enough to handle this responsibility, she is likely to get frustrated and move on to a more structured opportunity.

There is one additional SE trait that I'll describe that is probably the hardest to achieve: availability. The SE job market is so tight that you can expect a long fight to build a team of quality SEs. There are probably three job openings for every SE on the market, even for the most mediocre of candidates. This means you will probably be forced to make some trade-offs. You simply won't be able to find Mr. and Ms. Right. And if you do, you can bet several other companies are actively wooing them as well.