

## THE BATTLE ROYALE BETWEEN SALES AND 'PRE SALES

Let us agree – Selling or Sales is a tough job. Every Sales person goes through multiple rejections before closing that 'dream deal' !

While pursuing every opportunity is in the interest of Sales, this may put tremendous pressure on the Pre Sales team to support these opportunities. Given that the Pre Sales resources are fixed, which opportunity to pursue becomes a battle royale between Sales and Pre Sales. Since every opportunity comes with a degree of uncertainty, there is no clear science by which decisions can be taken on a pursuit. End result is that Pre Sales may respond with not adequate motivation possibly leading to an under prepared Bid/Proposal. A possible loss here will contribute further to the chasm between Sales and Pre Sales ending up in neither function being effective.

## WHAT IS THE NEED FOR OPPORTUNITY QUALIFICATION ?

Every organization would like to pursue opportunities in line with their business strategy AND the ones where they have the best chance to win. Remember the capacity of the Pre Sales team is fixed so pursuing all opportunities will lead to tremendous stress on the system and losses too.

The reality- it is impossible to pursue all opportunities and the organization has to 'pick its battles' with the highest likelihood of a win. The need for qualifying every opportunity becomes paramount given the limited resources available.

### Executive Summary :

Qualifying opportunities has been the bugbear between Sales and Pre Sales functions. The white paper examines a few questions like :

- Why do we need to qualify opportunities ?
- How does Qualification help ?
- Will there be a happy balance between aggressive Sales pursuits and effective Bid responses ?
- Is there a one standard way to qualify opportunities ?

## ARE ALL OPPORTUNITIES THE SAME ?

Opportunities can be classified into 3 types :

- Strategic (Tier 1) – these are opportunities which are large, likely to be complex and will catapult the organization to the next level
- Operational (Tier 2) – these are opportunities which are in the 'sweet spot' and the organization expects to have a high %age of wins
- Transactional (Tier 3) – these are opportunities which are routine and require minimal efforts to respond to them.

Given the above, does every opportunity need to have the same level of rigor for qualification ?



## IS THERE A 'ONE SIZE FITS ALL' APPROACH TO OPPORTUNITY QUALIFICATION ?

Clearly 'one size fits all' approach cannot be taken with Opportunity qualification. Let us examine them in the context of different types of opportunities :

**Tier 1** opportunities typically have long gestation cycle and by very nature are expected to be complex. The client environment and the marketplace are in a state of flux (not to mention our competitors also contributing to the fluidity) and therefore opportunities such as these require nurturing. Opportunity qualification needs to be continuous based on emerging information. A decision for a 'GO/NO GO' is more likely to emerge around the time an RFP is issued or the client asks formally for Proposals.

**Tier 2** opportunities comparatively have a short gestation cycle. Sales is likely to have sufficient information on the client 'pain and gain' scenarios and therefore be in a position to drive the Proposal strategy. An early call can be made on the GO/NO GO decision. The decision should be reversed only if there is compelling and information/evidence.

**Tier 3** opportunities need to have a very simple checklist based qualification process. Responses need to be in large volumes and therefore win ratios also likely to be low.

Opportunity qualification is a dynamic process and requires close collaboration between Sales and Pre Sales.

### Winning mantras :

Tier 1 opportunities require high effectiveness supported by an efficient Bid team

Tier 2 opportunities require medium effectiveness combined with an efficient response.

Tier 3 opportunities is all about efficiency.

CAPTION YOUR PHOTO HERE

*Qualify vigorously so that  
you know why you are  
winning or Losing.*

# OPPORTUNITY QUALIFICATION



## CAN SALES AND PRE SALES EVERY REACH HARMONY ?

Sales and Pre Sales can reach agreement if both have the same objective of winning more in the marketplace. A few high level steps recommended are :

- Pre Sales draws up the process and criteria for opportunity qualification
- Pre Sales walk through and collaborates with appropriate stakeholders in the Sales organization to agree and/or amend the process.
- Once agreed Sales commits to the process
- Pre Sales creates a highly responsive organization in line with the Strategic goals of the organization. This should include SLAs for Bid/Proposal responses.

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## About MindIT :

MindIT provides end-to-end Bid Solutions for companies who are in complex B2B engagements. MindIT collaborates with your organization to provide Process solutions, Bid Management solutions and training services.

In the past, MindIT has been engaged by clients like Capgemini, Hexaware, Zensar and more.

