The Metrics that Matter for Scaling PreSales

Establishing the right support ratio, maximizing team capacity, and elevating your people

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Introduction

In the modern B2B buying experience, PreSales teams are critical. They are the preferred partners for buyers, and they own what is often the largest component of the sales cycle. In businesses that are more enterprise-oriented or more consumption or expansion-driven, their role is even more prominent as the focus shifts from signing an initial deal to growing the relationship after the initial deal is signed.

Yet the science of how to measure and manage PreSales teams is nascent. What gets attention is unfortunately often what is easiest to measure. Because PreSales teams do not "own" the deal and have not traditionally had dedicated solutions to manage their work, this problem has only recently gotten more of the attention that it deserves.

Now, as a result of more extensive research, there is growing recognition that PreSales performance is an important driver of overall revenue growth, and there is growing demand for the science of PreSales analytics. We have so often heard more and more from PreSales leaders that they wish they knew more about what others are doing and finding useful.
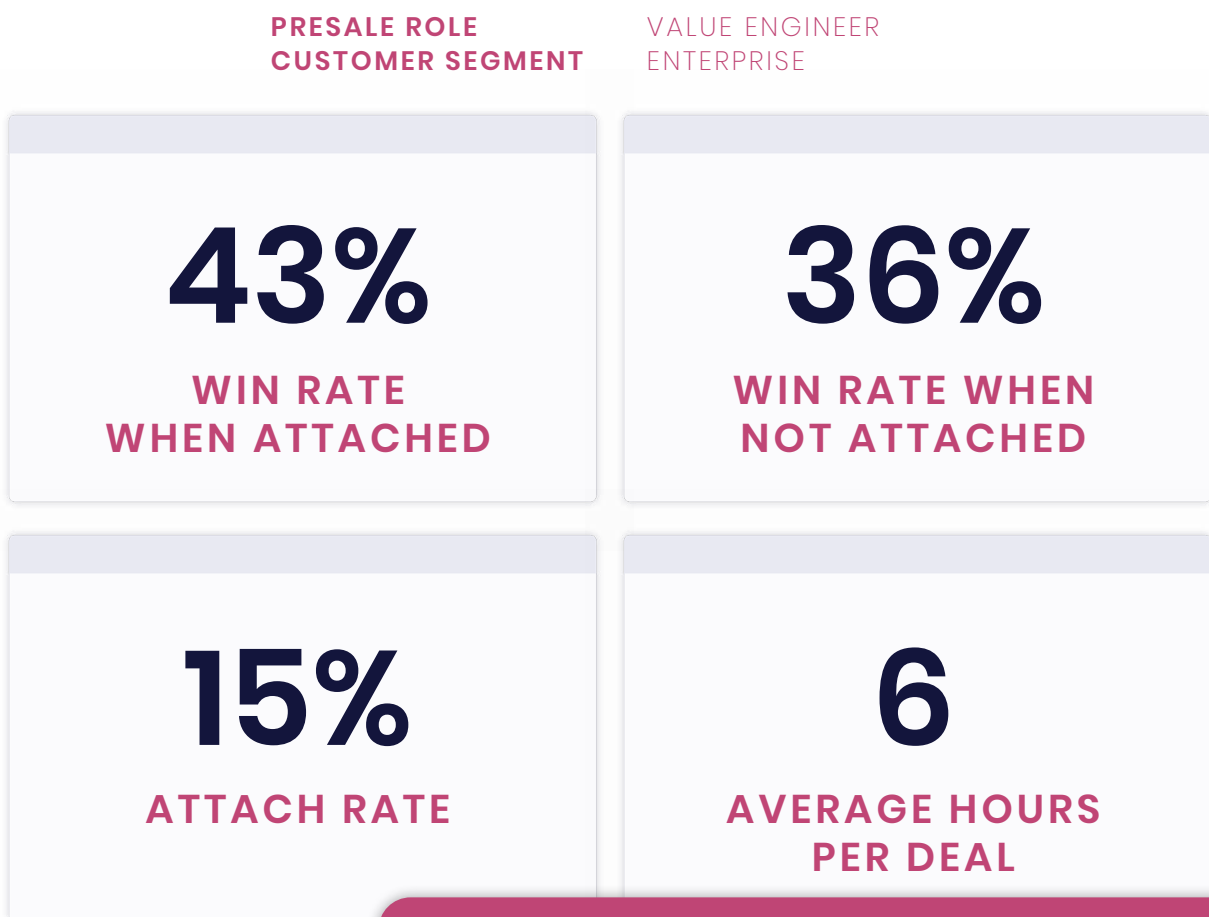
For many PreSales leaders, understanding PreSales activities and how to scale sales engineering efforts is the first step in a longer journey towards having data-driven conversations with company leadership that inform highly strategic changes.

In this eBook, you will get an overview of the metrics that matter for scaling PreSales, based on what we have learned from our work with PreSales leaders at all levels. Whether it's setting the right staffing levels, managing your teams, or growing the capabilities of each individual team member, we cover the greatest opportunities for change in each area and the metrics that you can use to make more informed decisions.

Setting staffing levels

What categories of deals (products, size, etc) should different PreSales teams (architect, product specialist, value engineer, etc) be attached to?

Key metrics: win rate with and without PreSales team member involvement, attach rate, and average effort required per deal

PRESALE ROLE
CUSTOMER SEGMENT

VALUE ENGINEER
ENTERPRISE

43%
**WIN RATE
WHEN ATTACHED**

36%
**WIN RATE WHEN
NOT ATTACHED**

15%
ATTACH RATE

6
**AVERAGE HOURS
PER DEAL**

As more consumption-driven business models flourish, PreSales leaders are discarding traditional **2:1 or 3:1 ratios between SE and AEs** and discovering that **1:1 or sometimes even inverted ratios of SEs to AEs are more effective.**

With little data to hand in the past, PreSales leaders have frequently felt compelled to accept external assessments about their organization. These assessments were often based on standard ratios not adapted to the characteristics of their business and accepted wisdom steeped in outdated views of buyers.

Now, PreSales leaders are instead driving these decisions from insights into modern buying preferences and unique data about what works in their organization, and they are reaching different conclusions that buck accepted wisdom and enshrine new practices.
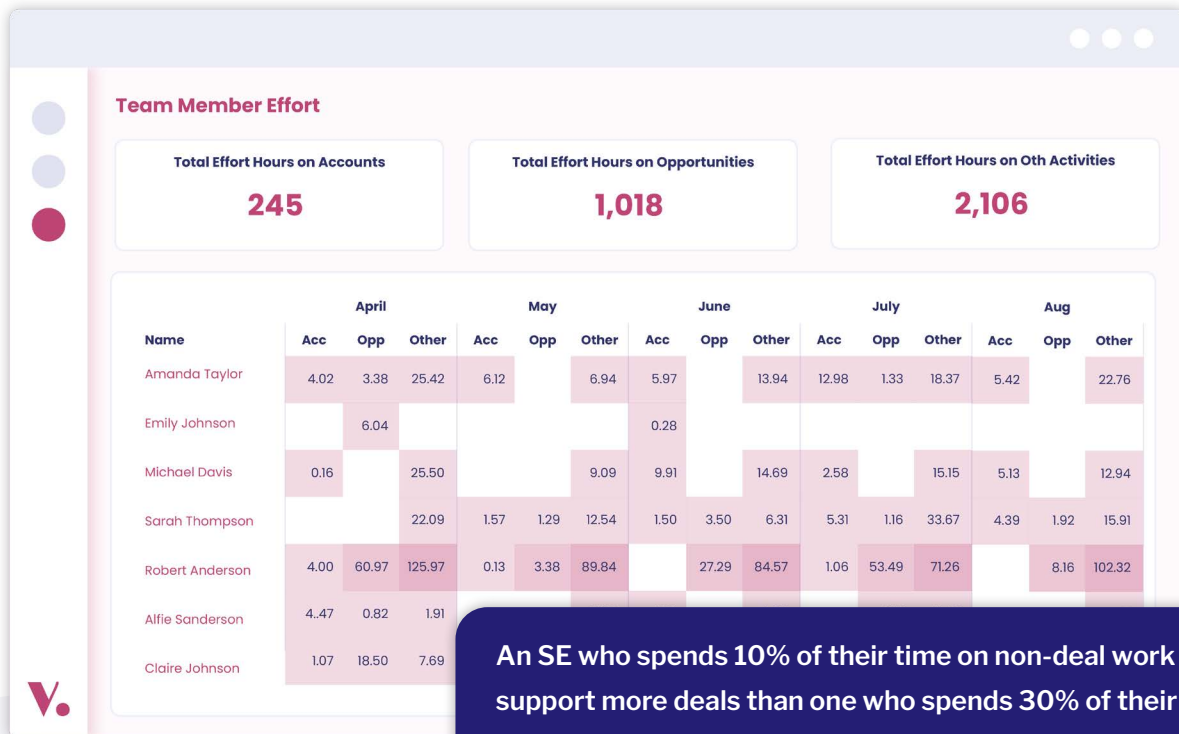
As more consumption-driven business models flourish, PreSales leaders are discarding traditional 2:1 or 3:1 ratios between SE and AEs and discovering that 1:1 or sometimes even inverted ratios of SEs to AEs are more effective. In these models, the initial booking is less important than the work that comes afterwards to drive the adoption of additional use cases, thereby increasing consumption, and this work is where SEs shine. Similarly, as organizations focus on the entire customer lifecycle, they are deploying SEs to drive expansion and increase net retention. In these situations also they are finding that they benefit from greater investment in SC product experts. Moreover, PreSales organizations are innovating and evolving to encompass many different roles, deployed in different ways, including not only solution consultants or sales engineers but also value engineers, product specialists, and RFP specialists. Through data and experimentation, they are discovering the right times and ways to deploy a much more diverse cast in order to maximize efficient growth.

Leaders are able to drive these conversations by capturing clearly the impact of each type of PreSales work. They look at PreSales lift relative to PreSales investment. To do this, you need to conduct experiments. By this we mean taking a set of similar deals and approaching part of the deals in one way and part in another. For example, you might attach a value engineer to a subset of deals or attach SEs to a portion of expansion deals. Then, you can look afterwards at the outcomes of the deals with and without the change. Did win rates in the deals with the value engineer increase? By how much? At the cost of how much time investment? If the win rate multiplied by the deal size is much greater than the cost of the additional time required, you have good evidence of a sound investment and a strong case to roll the change out more broadly.

Running these experiments carries a cost in more ways than one, so it makes sense to do them when you have a strong hypothesis. In a B2B organization with a complex technology product sold to large enterprises, there will typically be little question about whether SE support for new logo deals is valuable, and leaders would gain little by removing SEs from a set of deals just so that they can prove this with data. It makes sense instead to focus on open questions. Where would a new type of role make sense? Should SEs be in expansion deals? What is the minimum deal size for SE involvement? Are product specialists valuable in some cases?

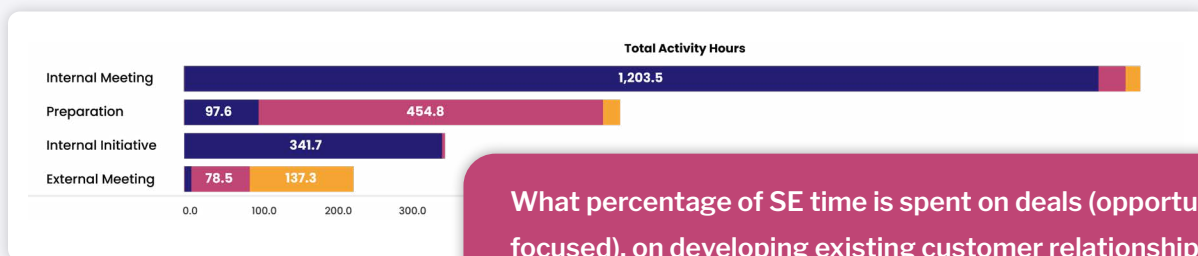# What is the right balance of deal work and non-deal work?

Key metric: distribution of activity hours by focus

Team Member Effort

Total Effort Hours on Accounts	Total Effort Hours on Opportunities	Total Effort Hours on Oth Activities
245	1,018	2,106

Name	April Acc	April Opp	April Other	May Acc	May Opp	May Other	June Acc	June Opp	June Other	July Acc	July Opp	July Other	Aug Acc	Aug Opp	Aug Other
Amanda Taylor	4.02	3.38	25.42	6.12		6.94	5.97		13.94	12.98	1.33	18.37	5.42		22.76
Emily Johnson		6.04					0.28								
Michael Davis	0.16		25.50			9.09	9.91		14.69	2.58		15.15	5.13		12.94
Sarah Thompson			22.09	1.57	1.29	12.54	1.50	3.50	6.31	5.31	1.16	33.67	4.39	1.92	15.91
Robert Anderson	4.00	60.97	125.97	0.13	3.38	89.84		27.29	84.57	1.06	53.49	71.26		8.16	102.32
Alfie Sanderson	4..47	0.82	1.91												
Claire Johnson	1.07	18.50	7.69												

> **An SE who spends 10% of their time on non-deal work can support more deals than one who spends 30% of their time on non-deal work.**

Hours of Effort by Activity Type

Key metric: distribution of activity hours by type

Total Activity Hours

Activity	Hours
Internal Meeting	1,203.5
Preparation	97.6 / 454.8
Internal Initiative	341.7
External Meeting	78.5 / 137.3

> **What percentage of SE time is spent on deals (opportunity-focused), on developing existing customer relationships (account-focused), or on other efforts (other)?**

In most organizations, it is commonplace for SEs to do important work outside of deals. As valued product experts, they may lead training sessions for the sales team, help product teams with new product roll-outs or UAT, or record website videos for marketing. The extent of these contributions are rarely captured completely or recognized fully, but they are an important part of the SE capacity equation. An SE who spends 10% of their time on non-deal work can support more deals than one who spends 30% of their time on non-deal work.

To gauge whether you have the right balance, start with a simple SE focus metric. What percentage of SE time is spent on deals (opportunity-focused), on developing existing customer relationships (account-focused), or on other efforts (other)? Based on this simple breakdown, you can ask several important follow-up questions.

First, is the balance of deal and account focused aligned with the mission and goals of the PreSales team at your organization? The distribution of SE activity across pre- and post-sales is an increasingly interesting question. Existing customers often benefit significantly from SE contact. SEs may have valuable insights on better ways to capitalize on the technology partnership, which could in turn lead to greater adoption and expansion opportunities. In more consumption-driven businesses, this may in fact be the majority of SE work (and may require a different type of capacity modeling more centered on consumption use cases).

All of this has resulted in a number of solutions team models that span both pre- and post-sales. It is, however, often unproductive when SEs are pulled into customer situations ad hoc, without a clear understanding of goals, how to measure impact, and what kinds of involvement are effective. In these situations, once they are armed with data about how much of a post-sales investment the organization is making, PreSales leaders can tee up the right discussions. Is the distribution of effort consistent with the organization's mission
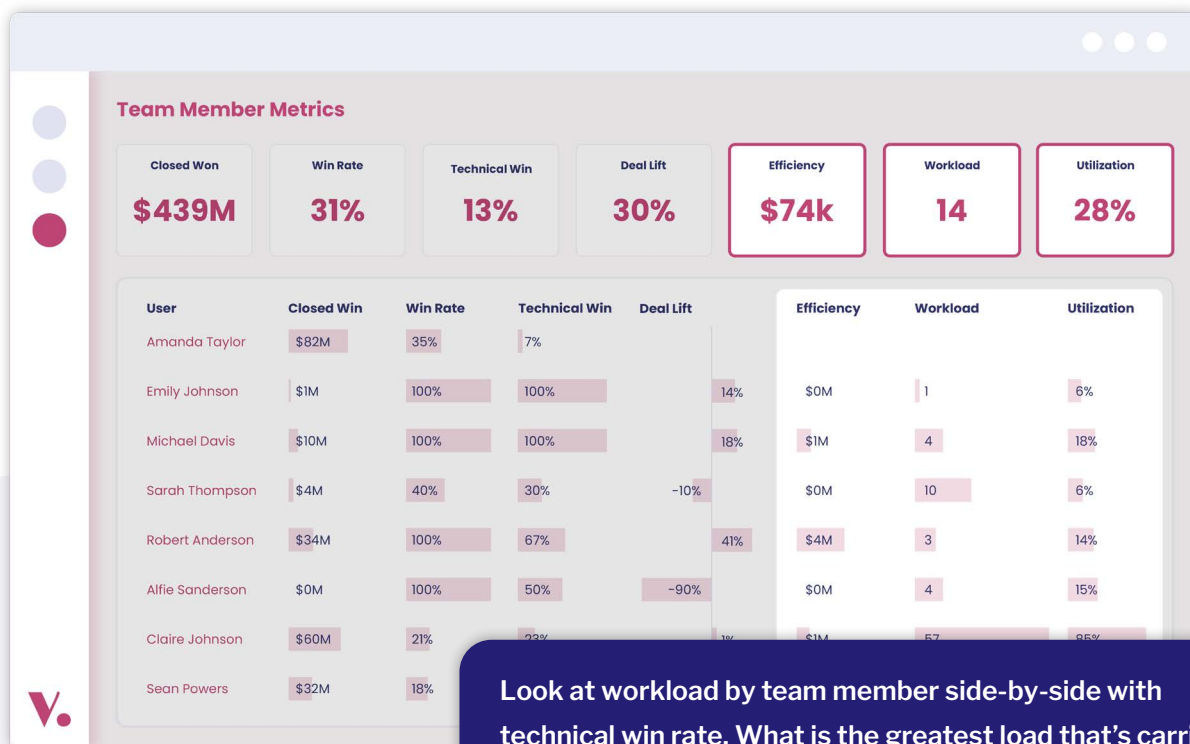
for the team? Are the right incentives, compensation plans, and KPIs in place to drive desired outcomes? How well are we measuring effectiveness? If good systems are in place, what impact has SE investment had on adoption, renewals, and expansion? Did the technology visioning workshop, the in-depth best practices session, or the QBR overview of new opportunities have the greatest impact? What does that suggest about the right balance of post-sales investment looking forward? Is the right engagement model being used, given organizational goals?

Second, once questions about the right pre- and post-sales balance are clear, is whether the 'other' work that SEs engage in is a good investment for the organization. And is there explicit agreement that the SE organization should make these investments and be funded accordingly? For example, it may be well worth it for an SE to invest in a recording for the website since that recording may be viewed by thousands of prospects. If, however, the need for these kinds of investments is not accounted for in SE capacity planning, it leads to unsustainable situations and misaligned expectations. There may also be investments that mitigate the need for SE manpower. These include capability-building (e.g., AE enablement) or technology investments (e.g., demo automation).

In all cases, what's important is that the time allocation is understood and that there is an explicit conversation about whether it is the right one to fund.

What should my PreSales support ratio be (for each of my different PreSales teams and segments)?

Key metrics: SE workload, utilization, technical win rate

Team Member Metrics

Closed Won	Win Rate	Technical Win	Deal Lift	Efficiency	Workload	Utilization
$439M	**31%**	**13%**	**30%**	**$74k**	**14**	**28%**

User	Closed Win	Win Rate	Technical Win	Deal Lift	Efficiency	Workload	Utilization
Amanda Taylor	$82M	35%	7%				
Emily Johnson	$1M	100%	100%	14%	$0M	1	6%
Michael Davis	$10M	100%	100%	18%	$1M	4	18%
Sarah Thompson	$4M	40%	30%	-10%	$0M	10	6%
Robert Anderson	$34M	100%	67%	41%	$4M	3	14%
Alfie Sanderson	$0M	100%	50%	-90%	$0M	4	15%
Claire Johnson	$60M	21%	23%	1%	$1M	57	85%
Sean Powers	$32M	18%					

> **Look at workload by team member side-by-side with technical win rate. What is the greatest load that's carried by team members who also retain a high technical win rate?**

Once you have established which deals each role should be attached to, you can establish your support ratio. In order to do this, you need to know how many deals each team member can carry. With that you can determine your AE:SE support ratio. It is the ratio of the number of deals that your PreSales team members can support and the number of deals that an account executive typically carries.

There are multiple ways to determine how many deals a PreSales team member can carry. One of them is to look at how many deals team members are able to carry while still remaining effective. For instance, you might look at workload by team member side-by-side with technical win rate. What is the greatest load that's carried by team members who also retain a high technical win rate? You are usually looking not for the highest number but for a number that appears to be repeatable across team members. Qualitative information is also valuable here. If one team member works hours that would be unsustainable for most others, you would not want to base your ratio on the deal volume that person is able to carry.

The amount of deals each SE can carry can also inform headcount planning discussions. Dividing your company's yearly revenue target by average contract value provides an initial estimate on how many deals PreSales needs to support for the year, and if the total number of opportunities needed to hit your company's revenue targets is higher than what the existing team can effectively support, additional SE headcount may be required.

It is also important to consider that not all deals are created equal. In many cases, workload may vary significantly by technical sales stage, segment, and industry vertical. In these cases, you can use the same approach but with a different workload metric. To take an example of stage variability, an SE's total deal workload may matter less than the number of deals in the midst of a technical evaluation, such as a POC. It may be more accurate in these cases to measure workload in terms of number of deals in the technical evaluation stage or in terms of number of in-flight POCs. If, on the other hand, effort varies significantly by deal type, it might be more useful to look at the mix of deals.

This might happen if the same SE works deals of different sizes, covering both commercial and mid-market deals for example. If you have tracked the relative effort involved in these different deal types, you could convert these into a single workload number by multiplying the number of each kind of deal by a weighting based on relative effort.

At this point, you should have the keys to a productive conversation about support ratios. You know which deals an SE should support and how many of them they can carry. If you then look at how many deals your sales organization progresses to the point where PreSales is involved, you can project staffing needs.

Managing people and capabilities

Are each of my team members able to win deals?

Key metric: closed / won amount per team member, win rate by team member, technical win rate by team member

Team Member Metrics

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Claire Johnson	$60M	21%	23%	1%		$1M	57	85%
Sean Powers	$32M	18%	18%	56%		$0M	16	10%

> **It's valuable to understand whether there are structural impediments. A below-average win rate might come about because an SE is focused on a particularly challenging region, product line, or customer segment (and the same thing may be true about an above average win rate).**

As a PreSales leader, you are keen for your team to excel, and your team's success hinges on closing deals. This starts with understanding the overall win rate and the total dollar amount closed / won and closed / lost for each team member. From there, however, there are several opportunities to go in greater depth.

First, it's valuable to look at the technical win rate, the rate at which prospects confirm that your product is the best fit for their needs.

All SEs are likely familiar with cases where the technical win alone was not sufficient to close a deal, and it's useful to surface this alongside overall win rate in order to see how heavily other factors are influencing the overall outcome.

Second, it's valuable to understand whether there are structural impediments. A below-average win rate might come about because an SE is focused on a particularly challenging region, product line, or customer segment (and the same thing may be true about an above average win rate). Alternatively, there may be issues in the working partnership between an SE and their AE, and enablement opportunities ahead that can improve team performance on future deals.

Finally, if there are not structural impediments, this becomes a jumping off point for coaching discussions. Are they allocating their time in the right way? Are they employing winning patterns? Are they executing well on those winning patterns?

Are each of my team members able to operate efficiently?

Key metric: efficiency per team member, workload per team member, utilization, hours spent on closed / won and closed / lost deals per team member

Team Member Metrics

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Sometimes, team members are able to win deals consistently but struggle with efficiency. This may take the form of below average deal workloads or unsustainable utilization levels.

Before looking at coaching opportunities, it's useful again to consider structural factors. Is the reduced efficiency consistent with others working in the same region, product line, or customer segment?

If other team members are able to be more efficient on comparable deals, there are several ways to drill further into coaching opportunities:

- How many hours are they investing in deals lost and deals won compared with other team members? E.g., is there an opportunity to improve deal targeting?

- What is the distribution of activities compared with other team members with greater efficiency? E.g., could investing more in discovery early reduce total effort on the deal?

- How long on average does it take them to complete key deliverables (e.g., POCs) relative to other team members with greater efficiency? E.g., could they learn from other team members how to complete key tasks more quickly?

Elevate Your Sales Engineers with PreSales Data

It's never been more important for organizations to invest in and elevate their PreSales teams. Through this breakdown of key PreSales metrics for staffing and team performance, we hope we have illustrated how much impact a fully enabled team can have.

Not only is the PreSales organization more effective, the entire sales organization is positioned to make better use of PreSales time, and win revenue more predictably. By sharing these approaches, we hope we will position more PreSales leaders to drive the right investments in people.

For a comprehensive view of all the metrics PreSales can use to prove their impact and drive strategic change, check out our **Definitive Guide to PreSales KPIs.** To learn more about how Vivun empowers PreSales to bring a brand new set of insights to the business and drive strategic change, visit **https://vivun.com/demonstrate-presales-impact** or request a demo.

About Vivun

Vivun is the leading provider of PreSales software. Its AI-powered platform supports a family of products that enable B2B businesses to accelerate sales and drive revenue more efficiently. With PreSales at the forefront of the modern go-to-market, organizations can manage their solutions teams globally, align sales and engineering to deliver products with incredible fit, and scale their demo abilities without more headcount. Customers include Snowflake, Zoom, Okta, Elastic, ADP, and Harness.

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