

How to Become a Sales Engineer

By Darrin Mourer, thesalesengineer.com

In this article I'm going to explore in great detail my general theories behind job hunting applied to everything I know about hiring (and being hired) for Sales Engineering positions. I'm going to make a general assumption that you aren't already an SE, though it applies almost equally as well to those switching companies. And, in case you're wondering, this should work well even in challenging economic times when sales organizations are being reduced.

Let's get to it.

1. Know the job

Back when I got my first SE gig, there weren't a lot of resources for finding out about the role of an SE. Much of it had to be learned on the job. Today, there are many resources. Start [here](#). Read the books I have listed. Subscribe and plow through the archives of each blog I recommend. You should feel like an industry veteran (sans direct experience) before you make your first job inquiry. This also ensures you know if the position is right for you, which leads me to my next point.

2. Understand your unique strengths

As I've mentioned previously, I am a big fan of business author Marcus Buckingham. I recommend you read two books of his for the purpose of this exercise, [Now, Discover Your Strengths](#) and [Go Put Your Strengths to Work](#). In the former, go through the Strength Finder to help you uncover your natural areas of talent and desire. Use the exercises in the latter to help you zero in on the types of activities you find most rewarding. This is important if your motivation in changing jobs is more intrinsic and less about a bigger paycheck—even though that never hurts. 😊

3. Determine your employer profile

After you thoroughly understand the role (conceptually at least) of an SE from step 1, you should know fairly quickly if the role is generally a match to your personality. Most of the books mentioned in the [SE Resources](#) page even have sections that help you think through this. If you have what it takes, keep reading. My advice: Just don't count yourself out too early. Speaking from personal experience, I learned I had many innate talents I could apply to the role that I never knew existed until I was forced to leverage them.

One aspect of [Making the Technical Sale](#) I found very insightful was the practice of understanding your personality traits to the point of using that to target companies that played

in market spaces that map to your strengths (i.e. finding the right company match). I view this as more applicable to seasoned SEs since it requires a deeper understanding about your skills that you may not have uncovered yet—even after the strength finding exercises from step 2. But I still recommend even new entrants to spend time reviewing the section to make an educated guess.

Once you have this understanding, you can put these pieces together to forge a profile of potential companies that 1) maximizes your chances of getting hired, 2) obtains the highest level of job satisfaction, which 3) sets you up for the best chances of succeeding as a new SE.

Your profile may be as simple as: A fast growing 100M+ enterprise software company with an established customer base selling desktop management solutions. It can get as specific as your understanding of yourself and the market allows, but even a simple profile like this one can allow you to narrow down potential employers to less than ten.

4. Research your profile companies

The goal of this step is to allow you to narrow down your potential company matches to just a few. At this point in the job hunt I am not in favor of using a job board or industry recruiters. You'll set yourself apart by contacting these companies directly and will keep your options open (some firms are not allowed to use recruiters for example). If all else fails this can still be a fallback option.

To determine your best matches, I recommend a few approaches:

- Think of the companies that best match your skill set and industry experience
- Use the corporate website to find out all of the products each of them sells
- Use publically available research to determine market leading companies in the space. Though not always the best fit, it's usually better to be employed by market leaders.
- Use your personal network (including social networks like LinkedIn) to find connections you may have that can provide more information about the company. More on this in part 2.

Using these basic approaches you should easily be able to find the top companies in the market that best match your profile.

5. Preparing to get the interview

The main point here is that you don't want to be going in blind when seeking an interview. This may be quite a lengthy process so bear with me.

There are two primary approaches to take in parallel. The first is to explore the career page of your target companies. You'll likely find a listing for an SE position on at least one of them, even

if it's not in your area. Don't worry about finding an open position, as you'll see this is usually only a minor hurdle. Look at what the companies are looking for in a candidate. Again, these are likely "pony descriptions" as in "Mommy, Daddy, I want a pony for Christmas!" Don't worry if you don't have some of the direct (or length of) experience they're looking for. You are looking for themes.

The 2nd approach is to bolster that understanding of the role by learning more about them via personal contacts in the industry. If you're an industry veteran this is probably very easy as most SEs stay inside the same industry most of their careers. For newer folks you can use services like LinkedIn to find out connections you may have to people in those companies or at least people who know people that can introduce you.

What you want to obtain is a pretty good idea about what skills and experience you need to possess to land your job. What are the technical skills? What type of background will they accept? What industry associations are desired? What about education? Though most of this is negotiable, your job is to make an honest comparison between your current self and this hypothetical perfect candidate. Start now and go become that individual to the best extent possible. I'm not saying you have to reenroll in college to go get a CS degree for example, but it might be a really good idea to take 2-3 months to hone your skill set.

During this time, take the opportunity to see about obtaining demo versions of the product. If you can't get direct access to it, spend a good deal of time online checking out product specs and reviews. At this point you only need to be able to converse at a high level about the product. Once you land the interview is when this work truly begins.

Though it may be tempting to apply for open positions, I strongly recommend waiting until you meet some of the desired qualifications before proceeding. If you interview too quickly, you may blow your chances permanently at your target companies.

6. The resume

This isn't a section on how to write a resume, only to provide some pointers about how to hone an existing resume. Now that you know about what your target companies are looking for, you need to play up that experience as much as possible. Be sure to add anything you've recently done to better align yourself.

Here is probably the most important tip: Write your resume for a specific company and position. You need to throw the idea away that you are creating a generic resume for 100 different companies. That is the old way. You are going to be recreating your resume for each company you target. If it sounds daunting, don't worry, you'll likely only have to do this 5 times or less. To help guide your efforts, search online for other experienced SE resumes. After you've seen a few dozen it will give you an idea about what type of information potential employers find useful.

Remember that target company profile statement you created. Specially crafted, that might make an ideal Objective statement for your resume. Yes, you need to include one. If nothing else it shows you at least took the time to customize for them. Best case, the SE Manager/Recruiter might think you are the perfect fit for the job. 😊

My last tip is to make sure your resume stands out a bit from a formatting standpoint. Conventional wisdom says you need to use something boilerplate so that HR departments and job sites can consume your resume electronically. Since we won't be relying on obtuse algorithms for an interview, it is more important that you go for something a little non-standard. Since you know your industry, you'll have a sense for how far you can push it before it becomes a detractor. Need some ideas? My favorite approach is searching through existing resumes for those in graphic design, advertising, or marketing. These folks are paid to be able to stand out. Take a cue from their examples.

7. Getting the interview

Armed with your understanding of the company, its products/services, ideal candidates, and a targeted resume, you're already way ahead of the game before you ever talk to a single person at the company about a job. This will give you added confidence when contacting them.

If it's a company of any significant size, again start with LinkedIn. Search for SE Managers, SEs, and others in your target location. Very quickly you should find people within their SE Organization. The goal is to begin constructing a rudimentary org chart. This is something reps are very good at doing with new customers.

When you think you have identified the right people or are close enough (not everyone has a profile of course), check out the backgrounds of these folks, especially if you found the local SE Manager. This includes general web searches too. The goal isn't to spy, just to get a better understanding of the people you'll be speaking with and identifying common talking points.

Once you have this information, it's finally time to make formal contact. I probably wouldn't start with the SE Manager in question; I'd start with an SE in your area. Call the company and ask for that SE by name. SEs are usually very busy (as you know), but most are very helpful by nature. Introduce yourself and be honest with how you got their name. Express your general interest in working for the company in an SE role and maybe ask a few softball questions to demonstrate you know a lot about the company already. End by asking for or confirming the name of the regional SE Manager. Thank them for their time. If they offer to forward your resume or make a call on your behalf, politely decline. That's your job and next step.

The goal of your next conversation is not to interview over the phone. The goal is to get them to agree to meet with you in person, regardless if there is an open position. When you make the call, again introduce yourself and the purpose of the call. You can also casually mention that you've spoken to someone on the team. You'll want to express enthusiasm over wanting to

work at that company and also demonstrate the amount of research you've put in to come to that conclusion.

When it becomes clear that you're not someone that just pulled their company and name off of Google, they'll be much more receptive. When you've reached that point, you can inquire about specific openings or ones that may be available in future. Be very prepared to hear that no openings exist right now (that's ok!). Mention that you are patient and that a successful company like theirs will likely expand, and when they do you'd like to be considered.

If they are local, ask if you can come in to speak with them for 30 minutes or join them for lunch. After spending 10 minutes on the phone with you they are far more likely to want to get to know you. After all, one of the jobs of the SE Manager is to maintain a reserve talent pool. If they won't agree, you can casually ask for other SE managers who may have positions in surrounding territories or verticals. Larger companies often have overlapping territories that cover specific customers that may also hire in your area.

At this point you have an excellent chance of walking away with an interview, an informal meeting, or at the very least other SE Managers in the company you can contact. Rinse and repeat until you have a formal interview. While still conducting your search, make a reminder to follow up and email them every 6-8 weeks inquiring if they have heard of any potential openings. If you've done your homework, this will almost always eventually get you that interview. But not to worry, you have a list of several companies to try this with simultaneously. View each experience as an opportunity to hone your pitch.

This process can easily take a month if not longer before you get your interview so don't get discouraged.

6. The interview

Depending on the position and industry, your interview could go several different ways, but there are common themes specific to the SE role that I will talk about here. Most SE interviews consist of the following:

- Meeting with the SE manager
- Meeting with 1-2 other SEs on the team
- Meeting with the sales manager
- Meeting with your potential sales rep(s)
- Being asked to give a presentation or demonstration (or other thinking on your feet—type task)

The big take away from this section is that, like in many things, luck favors the prepared. A quote I always enjoyed from Darren LaCroix (who won the Toastmasters World Champion of Public Speaking contest) is "I knew I was not the most talented; not the best speaker in the world. But, I thought, I can be the best prepared." Being better prepared will give you the edge you need simply because most people don't do it.

Here are things you need to have *mastery* over. Keep in mind that now you get to focus on a single company.

- The industry in which it operates (includes the competition)
- The company history, business model, and recent performance
- Current events that impact its business
- The products/services it sells
- How this position fits into their sales model

This list is short, but let me stress this point: *You need to come across as an industry veteran even if you don't have the specific experience.* This is because you will be competing with others that already have this knowledge. This is not the ticket to getting hired; this sacrifice in study is the entry fee.

With all of that said, here are my recommendations to distance yourself from the pack.

Prepare for a presentation/demonstration

When interviewing outside candidates, I always mention that they will be delivering a pitch to me on a specific product of ours and leave it at that, but many SE managers won't mention that or would be satisfied with any topic of presentation. The real self starters I have seen pull down our PPT template and product from the web and come prepared to do a full pitch on the spot. Ok, so maybe no one has ever done that to any extreme that I've witnessed, but I keep hoping to see it so I can hire them on the spot. If you aren't asked to prepare a pitch, do so anyway and make sure the interviewer knows you have it ready. I might even go so far as to mention that you understand it is hard to know how someone will perform under pressure and offer to go through your pitch anyway. Just don't force it on them.

The proposal

In addition to a preso and demo, I also recommend you craft a written proposal based on the company's product(s) and a case study (maybe even based on your current company). It can be as detailed as your understanding of their products, but you should minimally prepare a few-page report detailing how you would implement its product(s) at a company and the benefits the case study can expect to receive. It not only is a tangible demonstration of your knowledge but more so shows your initiative and willingness to go the extra mile. I kind of liken it to extra credit in school—the teacher will probably only glance at the contents, but you still get the full points just for doing it.

Interviewer questions

Most know to come to an interview prepared to ask a few questions. From what I've seen this does most interviewees more harm than good because many questions asked are shallow or

answers publically available. To me that demonstrates poor research skills and even poorer initiative. The type of questions you want to ask take two forms:

1. The tough business questions others are afraid to ask
2. Targeted questions that steer the conversation to your areas of strength

Asking the tough questions

Conventional wisdom will say to keep the questions mundane so you don't offend anyone or make the interviewer uncomfortable. The trouble is this sets you up as a less memorable (read: average) candidate. In order for you to make the right career decision you need answers to your tough questions. You also need to stand out. Get everything out on the table in a respectful and positive manner. Example: Bad question – What do you think about Competitor A? Good question – In my research it looks like Competitor A is gaining some market share by pushing feature xyz despite the fact it looks like you have a superior product. What's the company response been to this?

Targeted questions

Skilled conversationalists use this technique often to steer conversations to their areas of expertise. Recruiters call this the Question-Listen-Respond (QLR) technique. Based on your unique skills and history, prepare a few questions in advance you can use to highlight your strengths. Ask the interviewer an open ended question, listen intently to the response, and then add to that discussion by applying it to your strength. Example: "Product A looks like it would be a good fit for SOX compliance, but I didn't see a strong marketing push exploiting this. Is this a market you've explored in the past?" The interviewer will respond. Then you can add "I agree it's a bit of an untapped market. I participated on the SOX compliance project with my current employer and we definitely could benefit from a solution like this".

These are simplistic examples but I'm sure you get the idea. If you're wondering whether this is ethical or underhanded, my personal take is that you are completely justified in taking this approach. If you think about it, the interviewer (if any good) is certainly trying to steer the conversation and also using verbal techniques to get inside your head. I'm simply advocating turning it into a two-person sport.

Roles

As I mentioned it is likely you will be interviewing with several people, and possibly presenting to a larger group. Here are some tips about speaking with each persona.

Other SEs

Other SEs on the team are primarily interested in your technical abilities as it relates to your ability to add to the local collective knowledge base. The interview team will also look to SEs to specifically validate your technical abilities since they are really the only ones qualified to do so. Make sure you play up your technical abilities whenever possible.

Sales reps

Reps will primarily base their decision on your presence and communication abilities. They would much prefer a great communicator to a great product expert. Plus, they usually assume you'll be able to learn the technical piece on the job. If they see you nail the presentation, you'll likely be accepted in.

Sales managers

Sales managers will primarily be looking at your ability to function as part of a sales team. Their main focus is team revenue attainment and you need to convince them you can bring value to the sales team. Your understanding of the SE's role in the sales process is critical as is highlighting experience (or desire of) working with customers.

Astute SE managers understand these relationships and are mindful to only bring in qualified interview candidates since poor ones reflect on them and waste everyone's time. Expect the manager to prequalify you and make final judgment based on these criteria.

7. Closing and negotiating

After your interview comes the standard fare with thank you notes to everyone you spoke with. I have no specific tips other than just make sure you follow proper etiquette. At this point the manager's decision is already finalized; just don't blow it.

During one of your interviews or follow up conversations salary expectations were likely discussed. If you get down to the final phase of salary negotiation and/or offer letter, I would feel comfortable with minor negotiation around salary, but unless it is not a competitive offer, I wouldn't push it. Once you've got your foot in the door as an SE in your industry and have proven your abilities; that's when I would get aggressive.

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There is no doubt about this being a very lengthy and involved process. And I'll be the first to admit you can break into this industry simply with a high tech degree or background and a good recruiter. This process is not for those that let luck determine their outcome. While nothing can guarantee success, you'll find this to easily get you ahead of 90% of your peers and dramatically increases the chance you will not only break into the industry, but will also find a fit with a company that propels your career longer term. I wish you the best of luck with your endeavor.

Darrin Mourer has been an SE and SE Manager for close to ten years and is the managing editor of thesalesengineer.com, a blog all about being in Sales Engineering.