

How to Expand Presales Influence

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Introduction: The single-threaded influence trap



By: Chris Mabry
VP of Solutions and Partnerships at Reprise

As solution consultants and solution engineers (SEs), we live in the grey area: Influencing product, sales, marketing, and more. This is our superpower, and our strength lies in our understanding of varied needs within the business.

- We know more about sales than product, and more about product than sales.
- We know more about marketing than product, and more about product than marketing.

Yet, all too often, solutions consulting is relegated to a supporting role when it is essential to selling — especially as technical buyers are often the major decision-makers. This presents the largest challenge: How do we effectively demonstrate our value and expand our influence?

Many of us are caught in **a trap that I call single-threaded influence — and one I want to leave behind in 2025**. Single-threaded influence represents presales teams who are doing demos or executing on their tasks, and then moving onto the next one without comprehensive, strategic tracking. Solutions consulting has the ability to empower the entire customer journey, and oftentimes they are doing just that, but not tracking it.

Rarely in an executive meeting is the conversation about pipeline coverage, conversion rates, and retention tied to a solutions leader...but we know SEs

are making huge impacts on these metrics every day. What I'm pushing for is presales influence to be tied to things like board-level metrics such as customer acquisition costs, gross revenue retention, and pipeline generation.

When you attach yourself to these high level metrics, you're no longer just doing this demo or that activation. You're spreading the wonderful influence and knowledge you already have across the organization.

To show you how to navigate this grey area and expand your influence, we're introducing this eBook series. We're kicking off with how your solutions team can influence revenue.

What can you expect?

- A step by step framework for expanding presales influence on revenue
- Practical advice from presales leaders who have moved from transactional to strategic roles

Let's get started!

Step 1:

Brand your year: Setting goals and achieving alignment

The first step toward expanding your team's influence on revenue is setting a goal to do just that. Start by mapping out the areas where you may have the most influence over revenue, and where you can make measurable improvements over the course of a year. Use this information to set your team's goals.

To do this effectively, determine what went well last year and potential areas for improvement. Here are a few examples of goals you might examine to get you started.

1. Alignment with revenue goals

Ask yourself: How can we align better with revenue leadership to expand influence on revenue?

Evaluate what went well and identify gaps:

Conduct a review of last year's performance, focusing on areas where solutions had the most measurable impact on revenue. Use this to refine the team's objectives for the coming year.

Conduct lost deal analysis: Analyze technical and process gaps that contributed to lost deals. Use these findings to recommend product refinements or feature prioritization, working closely with product teams. Solutions consultants should not just provide demos but offer deeper insights into technical issues that could improve product positioning and your buyer experiences.

Participate in revenue processes: Ensure presales teams are included in forecasting and QBR calls. Their insight into deal health, technical gaps, and adoption trends can enhance pipeline accuracy. Solutions consulting should influence board-level metrics like customer acquisition costs and pipeline conversion.

2. Whitespace and expansion opportunities

Ask yourself: How can my team drive revenue growth by identifying whitespace and expansion opportunities?

Establish a trusted advisor mindset:

Solutions consultants should position themselves as advisors to existing customers, guiding them toward expanded product adoption. For example, solutions consultants can use deep knowledge of customer challenges and the current usage of your product to suggest expansions or upgrades. An action based on this goal might be to collaborate with your customer success team to proactively identify opportunities and conduct educational sessions to introduce upsell plays.

Be proactive about engagement:

Work closely with customer success and sales teams to conduct whitespace analyses. For example, solutions consultants can take action on this goal by hosting tailored sessions with existing customers to educate them about new products or features, which can both expand accounts and strengthen retention.

3. Lead qualification and efficiency

Ask yourself: How can we improve lead qualification and focus on higher-quality opportunities?

Create mutual qualification checkpoints:

Implement a collaborative lead qualification process with sales teams to ensure solutions consultants engage only with qualified leads. Develop a framework for mutual qualification checkpoints, ensuring leads meet specific criteria before presales engagement. To avoid the trap of unqualified demos, your solutions consultants should be empowered to push back on requests that lack proper discovery or preparation.

Collaborate with SDRs:

Support SDRs with messaging, qualification questions, and product knowledge to generate high-quality leads. For example, solutions consultants can guide SDR teams to better outreach by providing targeted advice on what resonates with potential buyers.

4. Demo process and scalability

Ask yourself: How can we refine our demo process to make it more efficient and scalable?

Automate and streamline demos: Take advantage of demo creation platforms to **build a demo program**. This can help scale repetitive demo tasks, while freeing solutions consultants up to focus on tailored presentations to technical buyers. The goal should be to build reusable demo environments and templated demo datasets that sales can use to customize for specific prospects.

Tailor demos strategically: Reserve highly customized demos for later stages of the deal cycle, focusing initial efforts on showing high-level value aligned with customer challenges. By using a demo program, you can encourage your solutions team to focus on later-stage or technical prospects they're uniquely qualified to speak with.

5. Refining ICPs and product-market fit

Ask yourself: How can we help refine Ideal Customer Profiles (ICPs) and support product-market fit efforts?

Refine your ICP with customer insights: Solutions consultants interact directly with customers and prospects, making them well-positioned to provide feedback on evolving customer needs and priorities. Gather recurring themes from sales calls, technical challenges, and objections to refine ICP definitions and sales strategies. For example, solutions consultants can align closely with leadership and product teams to influence buying processes and product go-to-market (GTM) strategies.

Create a product feedback loop: Create structured feedback mechanisms for solutions consultants to relay product insights to R&D or product management teams. Doing so helps solutions consultants move beyond just technical demonstrations to acting as domain experts, providing guidance on product evolution.

Once you've explored all of your possible areas for impact, choose a "brand" for your year that will reinforce your team's focus. Signposting with a brand that's motivational for your team can help everyone remain focused throughout the year. Not to mention, it can help external teams see that you're signaling a change, and understand the goals you're trying to accomplish.

Step 2:

Work collaboratively with revenue teams to achieve your goals

One of the best ways to take your initial goals and make them actionable is to establish councils to improve ongoing collaboration and influence. Let's take a few of the goals we've outlined above as an example, and build them out into an actionable plan for implementing a council.

Example 1: Improving collaboration with SDRs

Before launching the council, define clear objectives. If your goal is to improve collaboration and enablement for SDRs, you might choose the following objectives for your council:



Enhance lead qualification: Ensure leads passed to presales are high-quality and aligned with ICPs.



Bridge knowledge gaps: Educate SDRs on product features, technical differentiators, and the customer journey.



Improve messaging: Align SDR outreach messaging with presales insights about customer pain points and use cases.



Foster collaboration: Strengthen communication and trust between SDRs and presales for seamless lead handoffs.

Structure the SDR Enablement Council

Create a structure that makes your discussion collaborative. Include who will participate and your desired format, like the example below.

Participants:

Presales leaders: Provide strategic guidance, share insights from customer interactions, and oversee collaboration.

Senior SDR representatives: Share frontline feedback on outreach effectiveness, objections, and lead challenges.

Rotating members: Include a mix of SDRs and solutions team members to encourage broad participation.

Format:

Hybrid structure: Live meetings for collaboration and asynchronous tools (Slack, Teams, shared docs) for ongoing communication. Keep meetings short (approximately 45 minutes) and agenda-driven.

Define the charter

Create a charter document outlining what you hope to accomplish. For example, it might include elements such as:

Purpose: Align SDRs and presales for more effective lead handling.

Goals: Improve lead quality, optimize messaging, and enhance the buyer's journey.

Metrics: Track KPIs like demo-to-deal conversion rates, qualified lead volume, and time to conversion.

Responsibilities: Define who will provide data, lead discussions, and document action items.

Establish a meeting agenda

Keep the agenda consistent and actionable. Here's an example structure:

1. Review metrics:

- Discuss demo-to-lead conversion rates, unqualified demo occurrences, and SDR-generated pipeline health.

2. Feedback from SDRs:

- What objections or challenges are SDRs encountering during outreach?
- Are there specific pain points from prospects they need help addressing?

3. Feedback from Presales:

- Provide insights on the quality of SDR leads, including trends and areas for improvement.
- Share product updates, ICP refinements, or technical differentiators to incorporate into messaging.

4. Action Items:

- Assign tasks for improvement (e.g., updating SDR playbooks, refining lead qualification criteria).
- Document changes and next steps to ensure accountability.

Use tools for collaboration

Use shared tools for real-time updates and resource sharing:

- **CRM integration:** Centralize data on lead performance, lead scoring, and conversions.
- **Shared knowledge base:** Create a repository of FAQs, messaging templates, objection handling guides, and presales insights.
- **Communication platforms:** Use Slack/Teams for ongoing collaboration and quick feedback loops.

Provide training and resources

Conduct monthly enablement sessions:

- Educate SDRs on technical aspects of the product, ICPs, and market trends.
- Share real customer stories from presales to improve storytelling in outreach.
- Role-play common scenarios to help SDRs overcome objections more effectively.

Create feedback loops

- Gather ongoing feedback from SDRs on the quality of presales support and how insights are helping their outreach.
- Allow solutions consultants to provide input on lead quality and handoff processes.
- Review outcomes in each meeting to iterate and improve collaboration.

Measure success

Track the following KPIs to measure the council's impact:

- 1. Demo-to-close rate:** Ensure higher-quality demos result in better win rates.
- 2. Qualified lead volume:** Monitor improvements in the volume and quality of leads passed to presales.
- 3. Lead conversion speed:** Measure time-to-conversion for qualified leads.
- 4. SDR confidence and retention:** Survey SDRs to measure improvements in their confidence and satisfaction with presales collaboration.

Example 2: Refining demo process and scalability

For this council, one of the primary goals might be to more effectively target demo content in your demo program to your ICPs. You can read more of our practical advice on [building a demo program here](#).

Objectives of this council could include:



Align demo content to ICP needs: Ensure demo content highlights the most relevant pain points, value propositions, and use cases for each ICP.



Capture AE and SE feedback: Use front-line feedback from AEs and SEs to continuously improve demo effectiveness.



Streamline demo delivery: Create a demo program that includes templates and frameworks that improve demo efficiency and scalability while maintaining personalization.



Increase pipeline conversion: Use optimized demo content to improve demo-to-close rates and overall deal velocity.

Structure the demo council

Create a structure that makes your discussion collaborative. Include who will participate and your desired format, like the example below.

Core Members:

AEs: Frontline sellers who know what resonates with ICPs and hear direct feedback from prospects.

SEs: Technical experts who deliver demos and understand what features and stories resonate most.

Rotating Members:

Include marketing, product marketing, product management, and sales enablement on a rotating or ad-hoc basis for specialized input (e.g., during ICP updates or new product launches).

Define the charter

Purpose: Optimize demo content to better target ICPs, improve deal velocity, and increase win rates.

Goals:

- Create scalable demo templates aligned to ICPs.
- Reduce customization time by providing reusable assets for key verticals and use cases.
- Capture and apply feedback from both AEs and SEs to continually refine demo content.

Metrics for Success:

- Demo-to-close rate improvement by ICP
- Reduction in demo customization time
- Increased AE and SE satisfaction with demo templates

Meeting frequency and format

Define a cadence of regular monthly sessions to discuss demo performance, provide feedback, and review analytics. With a deeper quarterly review, you can then analyze trends and update demo templates based on new data or ICP refinements.

The meeting agenda could include the following elements:

1. Review performance metrics:

- Analyze demo-to-close rates by ICP, time spent on various demo sections, and common objections or pain points.

2. Discuss qualitative feedback:

- Gather input from AEs and SEs on what content prospects respond to most positively.

3. Identify gaps in content:

- Discuss where existing templates fail to address specific ICP needs or emerging trends.

4. Plan content development:

- Prioritize new demo templates or updates to existing ones based on data and feedback.

Design a collaborative process

This council's collaborative process could include the following steps.

1. Initial brainstorming session:

- Identify the most common pain points and objections faced by each ICP.
- Review existing demo templates and map their alignment to ICP-specific needs.
- Prioritize which demos need refinement or new templates.

2. Ongoing feedback loop:

- Create a shared repository for AEs and SEs to document prospect feedback (e.g., a Slack channel or CRM notes).
- Implement a rating system for demos (e.g., AEs/SEs rate demos by effectiveness after delivery).

3. Content development workshops:

- Host quarterly workshops with AEs, SEs, and product marketing to co-create or refine demo templates in your demo creation platform of choice.
- Create sample demo datasets (choose a demo platform that allows you to create synthetic datasets quickly and easily with AI).

4. Shared demo repository:

- Use a demo creation platform with role-based access control (RBAC) to ensure the right stakeholders have access to the right demo templates at the right time.
- Provide training on how to edit and customize demo templates, as well as inject custom datasets into demo templates.

Example outcomes and measuring success

ICP-specific templates: Create tailored demo templates for key verticals (e.g., healthcare, finance, manufacturing) that highlight relevant pain points, features, and outcomes.

Improved demo delivery:

- Reduce customization time for SEs by providing pre-built templates and datasets.
- Ensure demos are concise, targeted, and impactful for prospects.

Scalability: Build a library of reusable demo assets to help new AEs and SEs ramp faster, ensuring consistency in messaging across the sales team.

Higher conversion rates: Data-driven refinements lead to improved demo-to-close rates, particularly for high-priority ICPs.

Here are some KPIs you can track to measure success:



1. Demo-to-close rates: Improvement in deal conversion rates post-demo for each ICP



2. Customization time: Reduction in the time SEs spend customizing demos



3. Content adoption: Increased usage of standardized templates across the sales team



4. Feedback from AEs and SEs: Surveys or informal feedback to gauge satisfaction with demo materials



5. Sales cycle time: Reduction in the length of the sales cycle for ICP-specific deals

Step 3:

Use data to tie solutions efforts to revenue

The examples above give you sample KPIs that you can use to track your solutions team's councils and efforts to revenue-based outcomes. The goal whenever possible is to track presales contribution to deals, using metrics like win rates, deal velocity, and ARR influenced by presales involvement. In addition, track customer success handoff metrics, to measure presales influence on customer lifetime value (LTV).

Here are 10 specific metrics you can begin tracking in 2025.

1. Demo-to-close conversion rate

Why it matters: Demonstrates how impactful presales demos are in converting leads to closed deals.

How to Track:

- Measure the percentage of deals that progress to close after a demo is delivered.
- Segment by ICP, vertical, or demo type to identify areas for improvement.

Actionable Steps:

- Improve demo alignment with ICPs to address their specific pain points.
- Use analytics tools within your demo creation platform to track how prospects engage with demos.

2. Pipeline influence and velocity

Why it matters: Tracks presales' role in accelerating deals and influencing the pipeline.

How to Track:

- Measure the percentage of pipeline influenced by presales activities (e.g., demos, POCs, technical discovery).
- Track the average sales cycle length for deals involving presales vs. those that don't.

Actionable Steps:

- Standardize and optimize discovery calls to reduce delays in technical validation.
- Use automation to speed up repetitive presales tasks (e.g., automated demo environments or demo templates).

3. Average deal size growth

Why it matters: Presales can increase average deal size by uncovering additional customer needs and suggesting cross-sell/upsell opportunities.

How to Track:

- Measure the average deal size for opportunities involving presales.
- Analyze the percentage of deals where presales contributed to an upsell or add-on sale.

Actionable Steps:

- Train presales teams to identify cross-sell and upsell opportunities during technical discussions.
- Introduce value-based selling frameworks to ensure solution consultants highlight ROI and business outcomes.

4. Demo process and scalability

Why it matters: Directly correlates presales efforts to closing deals.

How to Track:

- Compare win rates for deals with presales involvement to those without.
- Break this down by ICP, deal stage, or product segment for granular insights.

Actionable Steps:

- Conduct lost deal analyses to refine presales approaches and improve future outcomes.
- Build reusable assets (e.g., objection-handling templates, competitive battle cards) to address common deal blockers.

5. Expansion revenue impact

Why it matters: Highlights presales' influence on driving additional revenue from existing customers.

How to Track:

- Measure the contribution of presales to renewal and expansion deals.
- Track presales involvement in whitespace or adoption analysis to drive additional product usage.

Actionable Steps:

- Partner with customer success teams to run quarterly product adoption reviews.
- Train presales to proactively identify expansion opportunities during customer interactions.

6. POC success rates

Why it matters: POCs are often critical in high-value sales cycles, and their success directly impacts deal closure.

How to Track:

- Measure the percentage of successful POCs that lead to closed deals.
- Track the average time to complete a POC and its impact on sales velocity.

Actionable Steps:

- Establish standardized criteria for POC success and ensure alignment with customer goals.
- Use presales resources strategically to manage POC scope and avoid unnecessary complexity.

7. Lead-to-demo conversion rate

Why it matters: Ensures presales teams are engaging with the most qualified leads.

How to Track:

- Monitor the percentage of leads that progress to demos and their subsequent outcomes.
- Analyze demo no-shows or disqualifications to refine lead qualification criteria.

Actionable Steps:

- Collaborate with SDRs and AEs to set mutual qualification criteria before solutions engagement.
- Use discovery templates and qualification questions to validate lead readiness.

8. Customer retention and renewal rates

Why it matters: Shows how presales efforts influence long-term customer satisfaction and retention.

How to Track:

- Monitor expansion revenue among customers who receive demos from SEs (e.g. track adoption of new features, products, or capabilities).
- Analyze adoption metrics for products tied to presales involvement.

Actionable Steps:

- Assist in onboarding by ensuring customers understand how to maximize ROI with your product.
- Conduct educational webinars or sessions for customers to explore advanced product use cases.

9. Sales cycle acceleration

Why it matters: Demonstrates presales' ability to streamline technical evaluations and speed up the buying process.

How to Track:

- Measure time spent in specific deal stages (e.g., technical validation, POC) with presales involvement.
- Compare the sales cycle length for deals with and without presales support.

Actionable Steps:

- Build a scalable demo program and reusable POC templates to reduce time-to-delivery.
- Incorporate automation tools to eliminate bottlenecks in the evaluation process.

10. Engagement metrics

Why it matters: Measures how impactful presales activities are in engaging prospects.

How to Track:

- Use analytics tools to monitor demo engagement (e.g., time spent on specific features, questions asked during sessions).
- Track content consumption (e.g., how often demo videos, proposals, or POC documentation are accessed).

Actionable Steps:

- Build data-driven demos that focus on the most engaging features for each ICP.
- Refine follow-up materials based on prospect activity and questions during demos.

Invest in the right technology to increase presales efficiency

A big part of supporting revenue-generating activities is making sure your presales team has access to the tools they need to increase their efficiency. Here are just a few examples.



Demo creation platform:

Access to a **demo creation platform** can dramatically increase solutions efficiency, allowing the team to create interchangeable templates of demos and custom datasets that sales can tailor and customize to specific live demo meetings. Creating a scalable and repeatable demo program empowers sales to run with consistent and highly relevant/on-message demo materials, while solutions consultants can stay out of the technical weeds of creating demos from scratch each time.



RFP software:

These solutions manage and automate the creation of RFPs, RFIs, and security questionnaires. Most get you 80% of the way and remove a lot of duplicated efforts.



Presales management software:

These tools help teams organize, capture, track, and manage presales data to generate insights for coaching and decision-making.



Sales enablement software:

These platforms provide content management, training, and analytics to improve sales team performance.

Practical advice from presales leaders on expanding influence on revenue

We hope that this framework and examples get you well on your way to expanding your function's influence on revenue in 2025. For even more inspiration, we asked three solutions leaders how they have navigated this challenge in their own careers.

Ron Whitson: Think like a business owner

Presales professionals who want to influence revenue must think like business owners. Just as we sell solutions to prospects by aligning with their needs and demonstrating business value, we must sell our ideas internally to leadership. Too often, presales leaders focus solely on developing the solution and fall short on the 'selling' part when it comes to gaining leadership buy-in.

I saw this firsthand when I needed to secure leadership approval for a better approach to delivering demos. Our presales team had a long-standing habit of spinning up new demo environments for nearly every opportunity. While this provided flexibility, it wasn't scalable. With the company's rapid growth, the cost of maintaining and hosting these environments was projected to exceed \$3 million within a few years. At the same time, everyone was being asked to do more with less. We needed a way to tell compelling, customized stories in our demos without having to create a brand-new tenant each time.

I built a business case around the need for reusable, quickly configurable demo environments that could be tailored to specific use cases while eliminating the inefficiencies of constant environment creation. By implementing tools that allowed us to modify and customize existing demos without standing up new instances, we could significantly cut costs while maintaining the ability to deliver relevant, high-impact demonstrations. The analysis showed nearly \$800,000 in savings in Year 1 alone, with the investment in the new approach being a fraction of that amount. More importantly, by reducing Customer Acquisition Cost (CAC), we freed up resources to reinvest in additional revenue-generating initiatives. Leadership saw the value, and the project was approved.

To drive real impact, we must not only frame our recommendations in terms of strategic priorities and revenue growth but also prove the value of the work we do. When we apply the same persuasive approach internally that we use with customers by showing tangible outcomes and business impact, we do more than support revenue. We create it.



Ron Whitson
Author of A Friendly Human in Presales and PreSales Collective Advisory Board Member

Chris White: Be proactive and build champions

Proactively look for growth and expansion opportunities: SEs are in a unique position to identify expansion opportunities during meetings and interactions with prospects and customers. My advice is to be on the lookout for additional challenges and use cases that the prospect or customer needs help with and bring those back to your sales counterparts.

Build technical champions: As SEs, our technical background and industry expertise often earns us greater credibility with key technical decision makers and influencers. You can leverage that to build rapport with key technical decision makers and influencers to help drive momentum in deals and ensure you have key people “selling on your behalf” when you’re not in the room.

Be proactive, not reactive: SEs make the mistake of waiting to be asked to engage or told what to do, with both customers and their sales counterparts. In 2025, be proactive with both your sales counterparts and in the context of a given deal or account. Be able to “run your own routes,” as I once heard an AE put it.



Chris White

Author of [The Six Habits of Highly Effective Sales Engineers](#) and Co-Founder of [Tech Sales Mastery](#)

Chris Mabry: Expand influence beyond single-threaded impact

In 2025, solutions consulting should move beyond single-threaded impact. Their influence should be tied to board-level metrics like customer acquisition costs, pipeline generation, retention, and revenue growth.

To make this happen, presales leaders must define what success looks like for their teams and actively shape how SEs contribute to business outcomes.

Your job is to focus on creating opportunities for SEs to make a broader impact. As a leader, you should consistently recognize and reward SE contributions that align with the team's expanded role, such as influencing pipeline or driving customer retention. Use positive reinforcement to create a culture focused on outcomes and broader impact. Advocate for your team by showcasing their impact on business metrics and redefining their role as strategic partners in the GTM process.



Chris Mabry

VP of Solutions and Partnerships at [Reprise](#) and [PreSales Collective Advisory Board Member](#)



Chart your course toward expanded influence today

We hope this eBook has left you inspired to advocate for a shift in solutions consulting influence. Using some of these tips and frameworks, your team can extend their reach and improve cross-functional alignment, without necessarily owning every process. By having a strategic plan, solutions teams can impact business outcomes without shouldering full operational responsibility.

As we've demonstrated, it's important to back your approach with data. It aligns all of your decision-making with company goals. Take advantage of these examples and ideas to shift your team's perception from tactical implementers to strategic revenue drivers.

Want even more advice on how to expand your role's influence on revenue?

Check out [The Presales Guide to Running a Killer SKO in 2025](#)

