CONCEPT

# Pre-Sales Engineering and Solution Consulting: Discovery, Demos and Technical Proposals

4 – 8 April 2027
Jeddah - Corniche four-star



# Pre-Sales Engineering and Solution Consulting: Discovery, Demos and Technical Proposals

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## Introduction:

Pre-sales engineering decides many technical deals before price is discussed, yet many teams demo every feature, answer tenders from old boilerplate and hand delivery teams a scope nobody validated. The result is lost technical wins, over-promised solutions and costly rework after signature. This Core Concept course trains pre-sales engineers and solution consultants to run structured discovery workshops, map customer pain to solution capability, size the scope, script demos, govern proofs of concept and write technical proposals backed by a value case. Participants build a Discovery-to-Proposal Pack and deliver a scripted demo for a case enterprise deal.

## Course Objectives:

- Position the pre-sales engineer's contribution at each stage of the sales cycle and agree a working model with account executives
- Qualify opportunities for technical fit, feasibility and effort before committing pre-sales resources
- Facilitate discovery workshops that elicit requirements, current-state pain and measurable success criteria
- Translate discovery findings into a capability map, solution scope and sizing estimate with stated assumptions
- Deliver scripted demonstrations and run proofs of concept against success criteria agreed in writing
- Produce RFI and RFP technical responses, a value case and a delivery handover that the implementation team accepts

## Target Audience:

- Pre-sales engineers who support account executives with technical discovery, demonstrations and proposals
- Solution consultants responsible for designing and presenting solution options to prospective customers
- Technical account staff who scope expansions, change requests and renewals for existing customers
- Sales engineering team members who respond to technical sections of RFIs and RFPs
- Product specialists and implementation consultants moving into customer-facing pre-sales work

## Course Outline:

### Day 1: The Pre-Sales Role and Technical Qualification

- Pre-Sales Engagement Model Across Lead, Discovery, Evaluation and Close Stages
- Account Executive and Sales Engineer Pairing Charter and Rules of Engagement
- Technical Win Versus Commercial Win: Defining the Pre-Sales Exit Criteria
- Technical Fit and Feasibility Qualification Scorecard
- Pre-Sales Resource Triage: Bid, No-Bid and Effort Budget Decision

### Day 2: Discovery Workshops and Requirements Elicitation

- Discovery Workshop Agenda, Pre-Read and Stakeholder Invitation Plan
- Current-State Process and System Landscape Mapping Canvas
- Problem-Led Questioning: Pain, Impact and Desired Outcome Chains
- Functional and Non-Functional Requirements Capture Template
- Discovery Summary Letter and Customer Playback Validation

### Day 3: Capability Mapping, Scoping and Demonstrations

- Pain-to-Capability Traceability Matrix and Gap Classification
- Solution Scoping Statement: In-Scope, Out-of-Scope and Dependencies
- Sizing and Effort Estimation with an Assumptions and Constraints Log
- Demo Storyboard: Tell-Show-Tell Script Built on Discovery Findings
- Demo Environment Readiness Checklist and Dry-Run Protocol

### Day 4: Proofs of Concept, Tenders, Value Cases and Objections

- Proof of Concept Charter: Problem Definition, Entry Requirements and Written Success Criteria
- RFI, RFP and RFQ Technical Response: Compliance Matrix and Clarification Questions
- Business Value Case: Baseline Metrics, Benefit Drivers and ROI Payback Model
- Technical Objection Handling and Competitive Trap-Setting Questions
- Pre-Sales to Delivery Handover Pack and Scope Sign-Off Meeting

### Day 5: Case Study: Enterprise Deal from Discovery to Proposal

- Case Study: Enterprise Opportunity Qualification and Discovery Workshop Run
- Case Study: Capability Map, Scope Statement and Sizing Estimate Build
- Case Study: Scripted Demo Delivery with Peer and Facilitator Scoring
- Pre-Sales Metrics Dashboard: Technical Win Rate, POC Conversion and Cycle Time
- Discovery-to-Proposal Pack Assembly and Review Panel

## Skills You Will Gain:

- Technical Opportunity Qualification
- Discovery Workshop Facilitation
- Requirements Traceability
- Solution Sizing and Estimation
- Demo Storytelling
- Proof of Concept Governance
- Technical Proposal Writing
- Value Case Modelling

## Why Attend This Course:

- Return with a Discovery-to-Proposal Pack and a scripted demo built on a case enterprise deal
- Stop feature-dump demonstrations by tying every screen shown to a pain point captured in discovery
- Reduce post-signature disputes by handing delivery teams a scope, sizing and assumptions log the customer has already confirmed
- Compare pre-sales practice with peers from software, telecoms, industrial equipment and professional services organisations

## Conclusion:

Pre-sales engineers earn the technical win by understanding the customer's problem before showing the product, and by proving value in terms the buyer can measure. The week moves from the pre-sales role and technical qualification, through discovery workshops and requirements capture, to capability mapping, sizing and scripted demonstrations, then proofs of concept, tender responses, value cases, objections and handover. On the final day each participant runs a case enterprise deal end to end and completes a Discovery-to-Proposal Pack ready for team review.