A 4-Step Guide to Engaging SMEs in the Sales Process

A guide to engaging with your SMEs in a **meaningful**, **purposeful**, and **mutually beneficial** way.

OMBUD

UNLOCK THE KNOWLEDGE OF YOUR SUBJECT MATTER EXPERTS

As B2B buyers expect more personalized, detailed information throughout the sales cycle, **subject matter experts (SMEs) have become increasingly vital.** Whether it's a product manager who can speak to the intricacies of your product use cases or a security professional who understands the complexities of GDPR, B2B selling "takes a village" now more than ever.

The need for SMEs in the sales cycle has also become more dynamic. Instead of only using them when an RFP or Security Questionnaire is necessary, sales teams are pulling them in for one-off questions, personalized SOWs and POCs, and even custom language in their sales proposals.

In this guide, we'll give you insights from our nine years of industry experience on how to best engage with your SMEs to **keep these engagements meaningful and mutually beneficial.**

STEP #1

Before You Engage, Be Resourceful

The easiest SME engagement is the one they don't even know about. Before shooting off an email to a colleague, be sure you've exhausted all of your resources. Scour your content and try to find the answer yourself (or get close) if possible.

Ask.

Start by asking your revenue team members if they've encountered this question or request before, and what the final response was. If you've been around the block a few times before, odds are the response may live in your email and chat threads.

Search.

If you're still coming up dry, scan any internal knowledge bases for relevant content. Sources may include sales team wikis, product knowledge bases (like Confluence), CRM notes, intranets, content management tools (like SharePoint), and sales content collaboration systems (like Ombud).

Validate.

If you locate the answer, check the date stamp. If it's more than 6 months old, validate with your SME that the content is still usable and up-to-date *(this also demonstrates you put in the initial effort to search for yourself.)*

By taking this extra effort, you're making this engagement more meaningful, instead of being the co-worker who asks the expert the same question every month.

STEP #2

When You Engage, Be Thoughtful

Sales probably isn't your SME's day job. These individuals may have no idea how important the deal you're currently working on is or have any understanding of your pipeline. Ensuring you give the proper information, context, and lead time will garner a more thoughtful and clear answer from your SME.

Proper context may include items such as:

- [x] how the sales cycle has gone thus far,
- [x] the roles of the people you're selling to,
- [x] which offerings are being sold,
- [x] what industry the prospect is in,
- [x] and what their organization does.

These data points can all help to pinpoint the appropriate response and shape their contribution appropriately.

EXAMPLE SCENARIO

If you're selling to a small company and it's at the floor of your pricing window, they may receive a different answer on a question about customizations and integrations of your offering than an enterprise prospect.

The goal is for the exchange to be as short as possible - giving your SMEs valuable time back to drive the business forward in their area of expertise.

STEP #3

Thank Your SME!

This might be a no-brainer, but in busy and hectic sales cycles, this is too often an afterthought.

As mentioned above, B2B sales cycles can “take a village” to get from lead generation all the way to a closed deal—which means it probably won’t be the last time you’re asking this SME for help.

Thanking them for their time and thoughtful responses, as well as doing the work ahead of the actual communication, builds rapport with your SMEs and fosters trust and respect between your teams, departments, and business divisions within a larger organization.

STEP #4

Document Their Responses

An important piece to every SME engagement is documenting their response for future use. That way, you'll be equipped with the correct response the next time a prospect asks this question or requests this content.

Add to your content repository.

If you have a sales wiki or centralized place for content, save this question/request and response in there and do so in a way that makes the content as searchable as possible. For instance, if the question includes "onboarding," but you most often hear prospects say "implementation" instead, consider modifying your phrasing so this content is easier to find.

Verify the content longevity.

Keep your content up to date and ensure response accuracy by verifying the longevity of the content with your SME. Getting their direct insights on any dependencies or upcoming changes that may impact the accuracy of the content will help you assign an appropriate date stamp or expiration date.

BONUS

Add SMEs into a Sales Content Collaboration Platform

I can't search for one-off questions in our current response management system!

The sales wiki is too convoluted!

I never know if content is still accurate!

If any of these sound like your team,
it's time for a Sales Content Collaboration platform.

These platforms are built with SME engagement and team collaboration in mind. SMEs are welcome in these platforms and encouraged to update their responses and content to frequently asked questions directly in the system. As a result, SMEs are ensuring sales teams always have the correct content available to them, and in turn, they are protecting their valuable time. Expiration dates and notification triggers come standard in systems like Ombud, as well as allowing sales team's to promote new content to SMEs for response.

ABOUT OMBUD

Customers rely on Ombud to automate the content-centric activities in their sales processes. Our platform combines content collaboration, project management, and machine learning to streamline the creation of sales documents like RFP responses, security questionnaires, sales proposals, statements of work, and much more.

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