The Future Sales Engineer

Mastering Technical Sales and Up 2 Speed Research Report
October 2025
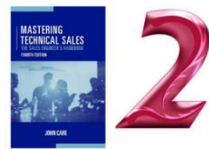
Contact: Michael Beurldsen
mb@up2speed.biz

The Future Sales Engineer

Acknowledgment

Executive Summary

The Research

Between July and September 2025, the Mastering Technical Sales and Up 2 Speed team conducted in-depth qualitative interviews with senior SE and Presales leaders from 38 global organizations, representing over 20,000 SEs.

Each conversation followed a consistent structure exploring:

1. How buying behaviors have changed and the impact on technical sales teams.
2. What high-performing SEs do differently from the rest.
3. How AI is changing and will continue to change the SE role.
4. What SE leaders are prioritizing to build future-ready teams.

The findings reveal a profession in transition, moving from technical validation to linking technology to business outcomes and now toward value co-creation built on trust.

The Evolution of the Role

Thirty years ago, being a great sales engineer (SE) meant knowing your product inside out. You were the technical expert, the person who could make technology work and explain every feature in detail. That expertise was enough. Twenty years ago, that changed. High-performing SEs began to understand that customers didn't just want technology; they wanted measurable business outcomes. The best SEs learned to speak the language of the customer and value, linking technology to impact. They became the solution experts, connecting what the technology does to what the customer needs. That may no longer be enough either. As ecosystems grow more complex and business problems more intertwined, the SE is evolving again; from solution expert to trusted value co-creator. Modern SEs do not just explain solutions; they build them in partnership with their customers, shaping outcomes and driving results together.

"The SE of today doesn't just explain how technology works; they help customers imagine what's possible." Global SE VP, Technology Infrastructure Company

The Evolution of the Sales Engineer

Technical Expert

Core Capability: Product Mastery.

Value Co-Creator

Core Capability: Strategic Influence & Collaboration

2000s–2020s

1990s–2000s

2020s

Solution Expert

Core Capability: Linking Technology to Outcomes.
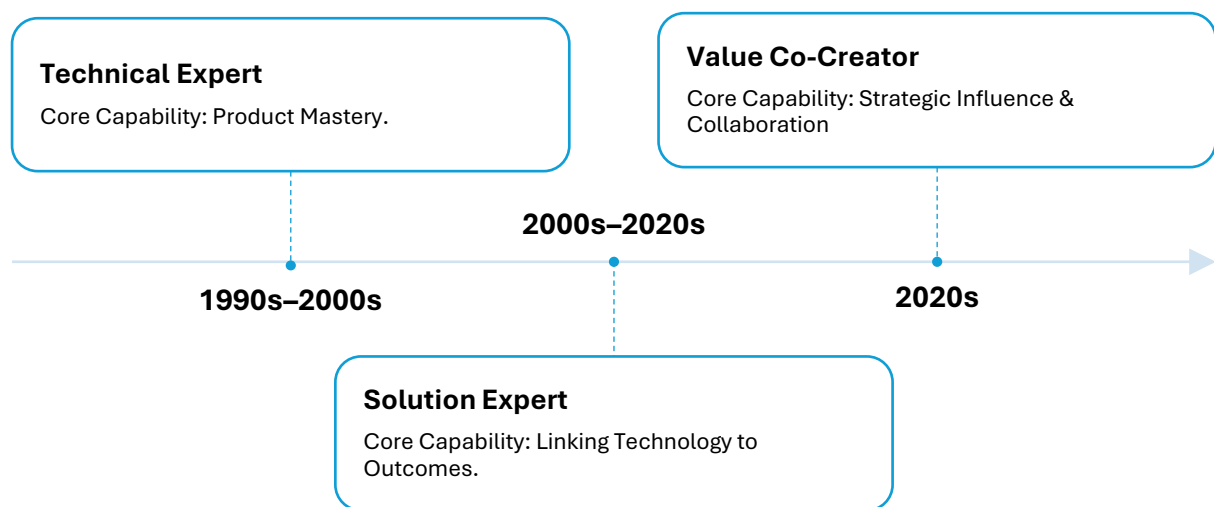
From Solution Expert to Value Co-Creator

Yesterday's high performers, the solution experts, were exceptional at translating technology into business outcomes. They connected capability to impact, helping customers see and prove business value. Today's best SEs go further. They are value co-creators, partners who work with customers to design and realize measurable value. Instead of simply aligning a product to requirements, they are shaping and creating the outcomes themselves.

"The SE's power now lies in helping customers design the business outcomes they want to achieve, not just showing how our technology works." – SE Leader, Global Cloud Provider.

The shift to a subscription and consumption-based model is one of the driving forces for SEs to co-create value. It is no longer about closing a one-time hardware sale and moving on. It's about continuously demonstrating ongoing business impact. Customers must see measurable outcomes and realize full value from their subscriptions, or they will stop renewing. This requires SEs to stay engaged long after the initial sale, guiding adoption, driving usage, and ensuring customers experience tangible success.

Many companies interviewed are also integrating AI into their solutions, offering customers a significant increase in use cases and potential value that neither the customer nor the SE has yet considered. Because AI is highly configurable, new and can be embedded in novel ways, the unknown becomes a source of value. In practice, SEs and customers must explore together, prototype, test, and refine to uncover unique solutions.

Co-creation means stepping beyond validation into collaboration. It demands curiosity to ask the next question, empathy to understand context, and the capability to challenge assumptions. Outstanding SEs do not wait for defined needs; they help determine what success could look like, then influence the team to achieve it. They do not just explain the

solution; they build belief in what's possible. This is the direction of presales: bringing insight, imagination, and partnership together to create outcomes customers truly care about and outcomes they perhaps had not considered without the SE guidance.

"You have no control over what your customer does, but you do have a lot of ability to influence their thinking about what they do." – Global SE Practice Leader, Networking Company.

From Managing Sales to Influencing the Ecosystem

Influence is now one of the SE's most valuable currencies.

Historically, SEs had to learn how to manage their Account Executives, ensuring their technical time and expertise were used wisely. That is still part of the job, but now the influence extends much further.

Modern SEs must lead through influence across the entire sales and customer ecosystem. They:

- Guide complex account teams that include product, customer success, and value management functions.
- Align internal resources and partners around the customer's priorities and help shape account strategy
- Lead conversations across business, finance, and technology roles within the customer's organization.

This influence reaches into how customers shape their future technology strategies and how the SE's own company innovates. The SE is uniquely positioned to shape both sides of the equation:

Influencing the strategic direction of the customer. SEs can help customers see what's possible, anticipate challenges, and guide the evolution of their technology strategies.

Influencing the product direction of their own company. SEs are the voice of the field. They bring first-hand customer insights back to product and engineering teams, helping shape innovations that truly meet market needs.

AI and the Future of Trust

AI is reshaping how SEs prepare, research, and communicate. It's fast, efficient, and widely available, potentially the best assistant an SE has ever had. But the future won't be won by those who automate the most. It will be won by those who are most trusted.

Across the interviews, over 80% of SE leaders (31 out of 38) explicitly emphasized trust as the decisive buying factor that AI cannot replace.

"In the future, every decision will come down to trust. Trust in the technology, and trust in the people standing behind it." – APJ SE Director, Infrastructure Company.

Over 80% of SE leaders (31 out of 38) explicitly emphasized trust as the decisive buying factor that AI cannot replace.

AI can analyze, summarize, and recommend. What it cannot do is reassure, commit, or deliver. That is the human edge. The modern SE treats AI as an amplifier, not a replacement. It handles noise, drafts summaries, prepares briefs, and surfaces insights so the SE can focus on what matters: listening carefully, simplifying complexity, and guiding decisions. When everything sounds intelligent, authenticity becomes the differentiator. AI also extends the SE's reach. It delivers faster access to customer data, market signals, and trends, giving SEs richer context and insights for every conversation. This means nothing though without context, curiosity and empathy. The SE must interpret the data for a specific customer, anticipate implications, and translate insights into action. That is where credibility grows. Ultimately, AI is raising expectations. Customers will expect more precision, faster answers, and consistent follow-through. But when the decision matters most, they'll still decide based on belief; belief that this team will do exactly what it promises.

"AI can summarize the meeting. It cannot summarize the relationship." Global SE Leader, Cybersecurity Company

The Future SE

The sales engineer of the future won't be measured by how much they know, but by how much their customers believe in them. Technology and AI will keep changing. What won't change is the human ability to connect, clarify, and build confidence. Tomorrow's SE will be:

- A Value Co-Creator – designing outcomes with customers, not just validating solutions.
- A Strategic Influencer – orchestrating collaboration across internal and external teams.
- A Trusted Advisor – one of the final decision points for customers.

The SE of the future will turn technology into meaningful outcomes by co-creating value with customers and building trust through result delivered.

Why Does This Matter

This matters because it reinforces one of the central findings of our ongoing research, recently updated in September 2025, that Sales Engineers are indispensable to how technology is evaluated, trusted, and ultimately purchased. The updated Mastering Technical Sales global study found that, across more than 9,000 buyers, SEs were rated twice as valuable as salespeople and nearly three times as valuable as vendor executives in influencing technology purchasing decisions. This evidence underscores the critical role SEs play as one of the most trusted links between technology and customers' business outcomes. As technology buying

becomes more complex and data-driven, the credibility, insight, and influence of the SE will remain one of the decisive factors in winning and keeping customers.

The Real Value of A Sales Engineer

| Throughout your technology purchase process, which of these sources/groups provided the most value to you and your team? (%) values			
Customer Position	Middle Management	IT - Individuals	CxO / Executives
General Collateral	24.0	20.6	14.3
Salesperson/ Manager	21.5	18.9	22.8
Technical Team	*40.2*	*47.7*	*42.5*
Executives	14.3	12.8	20.4

Source Mastering Technical Sales 5th Edition Research/September 2025 (n=9274)

What Comes Next

The following sections of this report explore the findings in greater depth. We examine how buyer behavior has evolved and what that means for the presales role. We profile the behaviors and mindsets of high-performing SEs and the traits that separate good from great. We also outline what SE leaders are prioritizing for the future, from scaling capability and technical learning to embedding AI as an enabler.

The remainder of this report is organized as follows:

1. Changing Customer Buying Behavior and Its Impact on SEs
2. What High-Performing SE Behaviors Do Differently
3. The Ten Things SEs Should Stop Doing
4. AI and the Evolving SE Role
5. What's Top of Mind for SE Leaders
6. Future Skills for the SE Profession
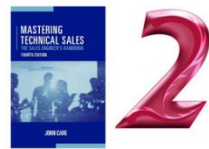
Changing Customer Buying Behavior and Its Impact on SEs

Overview

Recent years have brought some of the most significant changes in customer buying behavior seen in decades. Leaders consistently noted customers who are more informed, more demanding, and more cautious, expecting value to be proven continuously rather than promised upfront. These shifts are reshaping how SEs must engage, influence, and create value.

The Rise and Reality of Consumption, Hybrid, and AI

More than 70% of leaders noted cloud, subscription, and consumption-based models as the most enduring change in how customers buy, and one that continues to challenge organizations today. Although these models have been around for years, many companies still struggle to ensure that customers realize ongoing value from their subscriptions.

"We can close a deal fast, but if we do not prove value quickly, we lose it at renewal." – Regional SE Leader, SaaS CRM Platform.

"In the consumption business, the SE always needs to be engaged in showing new use cases and new ways to use the application, so customers consume more." – APJ SE VP, Data and Analytics Platform.

As one global presales leader summarized, renewal is the new sale – customers will only keep paying if they continue to see measurable outcomes. That makes adoption, usage, and business impact as critical as the initial purchase.

Meanwhile, interviewees said the cloud discussion has become more complex, not simpler. Customers are no longer choosing between on-premises and cloud; they're adopting hybrid architectures that combine both.

"Everyone acknowledges that and is looking at hybrid environments with different technologies and different cloud and on–premise states." – Global SE VP, Technology Infrastructure Firm.

Some organizations that initially moved aggressively to the cloud later realized that specific workloads still belong on-premises for reasons of control, compliance, or cost. Now, with the rise of AI and GPU-intensive workloads, those same customers are once again shifting workloads back to the cloud, not for infrastructure, but for access to innovation and experimentation.

"It's not just about where the technology lives anymore – it's about helping the customer decide what belongs where." – SE Leader / Strategy, Telecommunications Company.

Across many interviews, leaders said their companies are now embedding AI into their solutions, from analytics to generative AI applications, creating entirely new conversations. Many noted that AI isn't just another technology layer; it is prompting SEs to help customers imagine new use cases and co–create value in areas that didn't previously exist.

For SEs, the conversation has shifted from selling technology to orchestrating business outcomes.

Informed Buyers and Pre-Defined Solutions

60% of SE leaders said customers now enter the buying process already armed with research and often a preconceived view of what they want and where the vendor fits. The rise of online content, peer communities, and AI-generated insights means buyers frequently define their needs, and sometimes the solution, before meeting the vendor.

"Customers know a lot – they've done their research online. They often know as much about competitors and sometimes more about our own product." – Global SE Leader, Cybersecurity Software

"Customers are coming informed, sometimes badly informed, because not everything coming out of AI engines is right." – EMEA SE Manager, Supply Chain Software Company

One SE leader from a travel technology company noted that buyers often have a specific solution already in mind:

> *"They've already gotten in mind a specific technology of ours, and they're only asking about that. You have to work out ways to really understand the whole situation and what the entire organization may need."* – EMEA Presales VP, Travel Technology Company
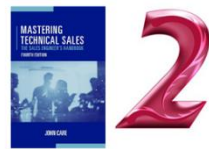
"They've already gotten in mind a specific technology of ours, and they're only asking about that. You have to work out ways to really understand the whole situation and what the entire organization may need." – EMEA SE VP, Travel Technology Company.

As a result, SEs must start where the customer is but not stay there. They need to respect the customer's pre-formed perspective while using questioning and insight to expand the conversation to a broader business discussion.

"More questioning. More into the consultative approach – using soft skills to navigate in a way where we respect the customer's perspective but still use the right proof points to sell more of our technology stack." – EMEA SE VP, Travel Technology Company

The ability to reopen narrowly defined conversations has become one of the SE's most critical skills. It's not about correcting customers; it's about guiding them to see the bigger picture.

Who SEs Now Need to Influence

Almost every leader interviewed highlighted the expanding circle of influence within customer organizations. The SE's credibility must now reach far beyond the technical team to include business executives, finance, procurement and operations.

"In SaaS, the buyer isn't always technical. They care about adoption, integration, and ROI more than specs." – EMEA SE Director, SaaS CRM Platform

Today's SE must tailor the story to multiple audiences:

- Technical value for engineers and IT.

- Financial justification for procurement.

- Business outcomes for executives.

"We're moving up market, into enterprise. The buying centers are changing. It's not just the standard technical audience we're selling to. It's important to create executive connections and come at it from both a top down and a bottom up perspective." – EMEA SE VP, Data Storage Provider

This evolution is shifting the SE's focus from proof of technology to proof of strategy, demonstrating how a solution fits into the customer's broader priorities.

Around 65% of SE leaders also emphasized the need for SEs to sell and engage higher in the organization, often reaching executive and C-level stakeholders. They noted that while this can feel uncomfortable for some SEs, it is increasingly essential for creating business impact.

"You cannot just sell to the technical team anymore, you're talking about a larger solution, and the SE has to engage higher in the organization." – APJ SE Director, Global Technology Infrastructure Firm.

This growing expectation means SEs must now be comfortable navigating business level conversations, aligning with executive priorities, and demonstrating strategic business value, not just technical credibility.

Procurement and Risk Teams Have Become Gatekeepers

Around 45% of interviewees said deals increasingly stall in procurement, finance, or legal, not in IT.

"Procurement is tougher – they know the market and are incentivized to reduce cost." – SE Manager, Manufacturing Software Company.

"The SE's role now extends into helping justify spend. You're not done when the technical team says yes." – Global SE VP, Global Technology Company.

This means SEs must learn to articulate business risk reduction and financial justification, not just technical fit.

Security Teams as Key Influencers

Several leaders highlighted that security teams now play a decisive role in customer buying decisions, often joining evaluations earlier and shaping or even vetoing solution choices. This reflects a broader trend of risk awareness across industries.

"Security is now everyone's business. Even when we're not selling a security product, the security team still needs to approve or validate it." – Global SE VP, Cybersecurity and Cloud Provider

Customer Buying Behavior
% leaders noted...

70%
Cloud / subscription models, ongoing value realization

65%
Need to sell and engage higher in the organization

60%
Coming pre-informed or with a pre-defined solution

"The security conversation shows up in nearly every deal now, identity, compliance, data sharing, SEs have to be ready for it." – Global SE Director, Identity and Access Management Platform

"Security reviews are getting tougher. You have to speak the same language as the CISO." – Global SE Manager, Enterprise Software Company

One enablement leader from a global technology infrastructure firm described how overlooking security stakeholders can stop a deal in its tracks:

"A proof of concept team thought they had it in the bag. Then they met the customer's security team, who brought the networking team – and the networking team said, 'No, we're putting a hold on this. You never brought us into this.'" – Global SE Enablement Manager, Global Technology Infrastructure Firm.

This means SEs must be comfortable engaging with CISOs and security architects, understanding risk frameworks, and positioning their solution in terms of compliance, data protection, and trust, not just functionality or performance.

The "Show Me" Culture and Price Pressure

About half of SE leaders said buyers have adopted a "show me, do not tell me" mentality. Pilots, and proofs of concept are now baseline expectations.

"Customers are more jaded; they've heard the words before. Every vendor tells the same story; now they want to see how it actually works." – Global Practice SE Leader, Global Networking Company.

Meanwhile, roughly one-third of interviewees mentioned growing price pressure and feature fatigue.

"Customers are much more value driven now. They're not paying for features – they're paying for proof that it solves a real business issue." – Global SE VP, Cybersecurity and Cloud Provider.

For SEs, this underscores the need to link every feature and capability to a clear business outcome.

Summary

Customer buying behavior today is defined by choice, consumption, and complexity. Customers expect flexibility in how they buy (subscription, cloud, hybrid), confidence in what they buy (proof and validation), and partnership in how they succeed (ongoing value realization).

For SEs, that means:

- Engaging across more functions – business, finance, operations, and IT.

- Continuously demonstrating value to sustain adoption and renewal.

- Expanding narrow product discussions into broader, outcome-driven dialogues.
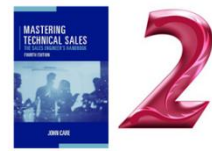
What High Performing Sales Engineers Do Differently

Across the interviews, leaders described a consistent picture of what sets the best apart. High-performing Sales Engineers are not defined by how much they know but by how effectively they translate complex technology into business impact, build trust, and influence outcomes.

They balance the technical and the commercial, curiosity with credibility, confidence with empathy, and influence with accountability. They embody the evolution of the role: from technical expert to solution expert, and now to trusted value co-creator.

.

The Five Traits of a High Performing Sales Engineer

CURIOSITY & PROBLEM SOLVING | BUSINESS OUTCOME FOCUSED | PRESENCE & IMPROVISATION | LEAD WITH INFLUENCE | OWNERSHIP & COMMERCIAL DRIVE

1 They Solve Technical and Business Problems Through Curiosity and Creativity

Over seven in ten leaders identified curiosity and problem solving as the most visible hallmarks of top performers. They approach every engagement as problem solvers who ask better questions – not just what and how, but why. "*Fundamentally, you're still trying to help customers solve their problems ... our job is to bridge that gap between the customer's business challenges and the technology*." – Global SE Leader, Open–Source Software Company.

An EMEA SE leader described how, in open source environments, customers often "*already know more about our product than we do*." Instead of being intimidated, top SEs use that as an opportunity to learn. "*The best ones turn it around by asking brilliant questions – 'How are you actually using this in production?' – and learning from the customer. They sell by being curious.*"

He emphasized that what sets these SEs apart isn't just technical mastery but genuine passion. "*When customers see you genuinely want them to succeed, they'll stay an hour longer in the room. They can feel your passion*." That authenticity, he said, is what builds trust and turns a technical conversation into a lasting partnership.
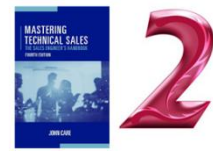
A global SE practice leader emphasized that the most successful engineers thrive on solving business problems rather than showcasing features. "*Customers can find every spec online. Our value is creatively applying technology to solve problems that they cannot figure out*."

He explained that top performers strike a balance between technical depth and creative perspective. "*What I look for is people who are curious enough to go deep, but creative enough to know when to step back and see the big picture."*

For him, that blend of curiosity and creativity is what separates good SEs from great ones – those who not only fix problems but reframe them, guiding customers toward outcomes and business value they hadn't considered.

High performers strike a balance between business curiosity and understanding the customer's business, combined with technical credibility, so their advice is trusted.
"*The further you get away from the technology, the less credible you are with your colleagues, with engineering, and with customers and partners."* – Global SE Leader, Open Source Software Company

2 They Think in Business Impact – Not Features

More than sixty percent of leaders said high performers connect technology to business results. "*The SE is just as much a seller. The best ones know how to translate what we do into business value."* – Global SE Enablement Leader, Enterprise Infrastructure Firm.
"*They can guide customers along the journey – not just in technology, but also in business impacts."* – Regional SE Leader, Cloud Infrastructure Company.

A regional SE director cautioned against what he called the "knee-jerk reaction" to jump straight to a solution. "A customer says, *'I'm having problems protecting my website*,' and we respond, *'Here's a solution!*' Instead, we should ask, *'How long have you had this problem? How is this impacting your business?"*

He explained that the best SEs resist the urge to impress with immediate answers. They "*walk it back, show empathy, and do real discovery before rushing to a solution*." By taking the time to understand the context and motivations, they earn credibility and uncover deeper issues – often revealing a more strategic opportunity than the one initially presented.

These SEs research how their customers make money, understand cost models, and tie every capability to measurable value. Thinking commercially doesn't replace technical depth; it multiplies its impact.

3 They Own the Room and Improvise When It Matters

Over half of all interviewees mentioned confidence and presence as key differentiators. High performing SEs prepare relentlessly but remain flexible enough to adjust mid-conversation. "*They love presenting. It's showtime for them. They enjoy it, they bring energy, and they get the audience on their side."* – Regional SE Leader, Technology Infrastructure Company.

Several leaders shared examples of SEs who sensed executive disengagement and adapted mid–meeting, shifting from detailed slides to simpler, outcome-focused discussions. Leaders cited this kind of earned improvisation, the ability to pivot while staying credible, as a hallmark of top performers.

One SE leader shared that many engineers "*spend weeks perfecting the demo and an hour thinking about how to tell the story.*" His highest performers do the opposite – they dedicate as much time to crafting the narrative as to refining the technology.

He recalled a standout SE who transformed a routine municipal use–case demo by integrating AI image recognition on vehicle license plates to surface tax and routing data in real time. The demonstration instantly connected to the customer's business challenge. "*The customer said, 'That is exactly what we've been trying to build.'*" The moment captured what separates good SEs from great ones – translating technical brilliance into a story that sparks belief and excitement.

An EMEA presales VP described how her top SEs "own the room" not by dominating it but by creating confidence. "*Owning the room doesn't mean talking the most. It's about making people feel comfortable that they're in good hands.*"

She explained that the best SEs can "*simplify complex things without making others feel stupid,*" and that their composure stems from preparation. "*That confidence comes from preparation. They've done the work, so they can stay calm and adapt.*"

When an SE brings that kind of presence, she said, "*You can see it in the room – everyone relaxes because they know this person has it under control.*"

4 They Lead Through Influence

Roughly half of the leaders said the modern SE's success depends on orchestration. Top performers align Account Executives, Product, Customer Success, and partners toward a shared customer outcome. "*Collaboration is key, step up more in the sales cycle.*" – Regional SE Leader, Cloud Data Platform.
"*You have to guide the AE, the product team, and the customer – you're the thread that holds it together.*" – Global SE Leader, Telecommunications Company.

Influence here refers to leadership without a formal title. These SEs earn it by bringing insight, reliability, and calm into complex situations. They make connections others overlook, linking product direction to customer feedback or aligning internal teams before escalation arises.

A global enablement leader described how her top SEs lead by connecting the dots across the organisation. "The SE often sits at the centre of the storm – between sales, product, and delivery," she said. "*The best ones connect all three before anyone asks them to.*"
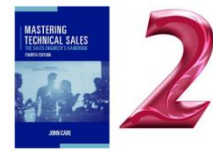
She noted that these SEs earn influence through consistency and credibility. "*Influence isn't about hierarchy. It's about being the person others trust to get it right.*"

5 They Take Ownership of Outcomes and Think Like Sellers

High performing SEs enjoy selling! They see their work as part of the revenue engine, not an adjunct to it. Several leaders highlighted that their best SEs are motivated not only by solving problems but by winning. "*A well-rounded SE is worth more than a well-rounded AE ... the SE is just as much a seller.*" – Global SE Enablement Leader, Enterprise Infrastructure Firm. "*They're sales-driven engineers. They love solving problems, but they also love winning.*" – Global SE Leader, Cybersecurity Company.

Several leaders noted these SEs as commercially aware and proactive in driving renewals, expansions, and adoption. They anticipate business issues, link success metrics to customer outcomes, and hold themselves and the rest of the account team accountable for both technical and commercial results.

A global SE director from a major technology company explained that his highest-performing engineers treat every engagement with a commercial mindset. "*They think about next quarter, not just the next demo.*"

For him, commercial awareness is inseparable from influence. "*If you do not understand the commercial motion, you cannot influence it.*" The SE's role, he added, is not only to prove technical value but also to accelerate business outcomes, knowing which opportunities to prioritise and how their work connects to the pipeline, forecast, and renewal.

"At the end of the day," he concluded, "we're all in sales, we just sell differently."

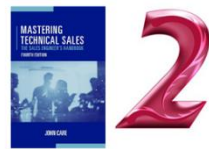## Summary

High performing Sales Engineers consistently:

1. Solve Problems Through Curiosity and Creativity
2. Translate technical capability into business impact.
3. Own the room through presence and improvisation.
4. Lead through influence across the ecosystem.
5. Take ownership of technical and commercial outcomes and think like sellers.

Through these behaviors, high performing SEs move beyond selling technology to value co-creation, working side by side with customers to design, deliver, and prove business outcomes.

Frequency of High-Performing SE Behaviors Mentioned by Leaders (n = 38)

Code / Theme	Description of Behaviour	% of Leaders Mentioning	Representative Evidence (Anonymized Quote)
Curiosity & Problem Solving	Explore both business and technical contexts to uncover unseen value	70%	"Be curious and be proactive. Always ask questions, try to understand more."
Business Outcome Focused	Translate technical features into measurable business outcomes.	63%	"The best ones know how to translate what we do into business value."
They Own the Room - Presence & Improvisation	Communicate with confidence; adapt in real time to audience needs.	55%	"They love presenting. It's showtime for them, they bring energy and get the audience on their side."
Lead Through Influence	Orchestrate AEs, Product, Customer Success, and Partners toward shared outcomes.	52%	"You have to guide the AE, the product team, and the customer; you're the thread that holds it together."
Ownership & Commercial Drive	Commercially Driven	48%	"They're sales-driven engineers. They love solving problems, but they also love winning."
Value Co-Creation (Integrative Theme)	Partner with customers to design, deliver, and prove measurable value.	≈ 75 % *(embedded across all other codes)*	"Fundamentally, you're still trying to help customers solve their problems ... bridge that gap between business challenges and technology."

Source: Mastering Technical Sales Research Interviews (July – September 2025)

The Ten Things SEs Should Stop Doing

SE leaders spoke openly about the habits that limit performance. They agreed that technical excellence is rarely the issue (though if not maintained it becomes a significant one); what limits impact are the habits that waste time, dilute influence, or erode trust. The following list captures the ten most common behaviours leaders said their SEs should stop doing, in their own words.

1 Stop Leading with Technology Before Understanding the Problem

"They tend to go technical too early, and that can confuse people. I would suggest to stop doing that." – Global SE Leader, Infrastructure Company

"If we just listened and clarified before proposing, we'd sell a lot more." – Global SE Director, SaaS Company

2 Stop Over Demoing and Feature Dumping

"Stop showing so much software ... once they're sold, stop talking." – EMEA SE Leader, Cloud Platform

"The demo is not the product; it's the conversation about value." – Global SE Enablement Leader, Infrastructure Firm

3 Stop Walking into Meetings Unprepared

"Stop going to meetings without having any context." – Regional SE Leader, Telecommunications Company

"Know who is in the room and why you're there – otherwise you're just burning time." – EMEA SE Director, Software Company

4 Stop Acting Like a Sales Rep's Assistant

"They need to stop doing that and start saying no." – Regional SE Leader, Telecommunications Company

"The SE drives 75 percent of the sales cycle – own it." – Same Leader

5 Stop Over-Accommodating and Doing Everyone Else's Job

"We are a population that just wants to please everyone ... we accept things we should not accept." – Global SE Leader, Cybersecurity Company

"Do not compensate for others ... go back and say, 'This is your job – do it; I'll help you, but do it.'" – Same Leader

## 6 Stop Over-Engineering Solutions

"Sometimes we solve problems the customer hasn't even asked for." – EMEA SE Leader, Technology Infrastructure Company

"Perfectionism kills speed." – Global SE Director, Infrastructure Firm

7 Stop Complaining About Internal Issues

"The normal behaviour is to complain about the roadmap ... instead of understanding the challenges on the other side." – Global SE Leader, Software Company

"If you do not like something, fix it with the product team, not at the coffee machine." – Global SE Manager, Platform Company
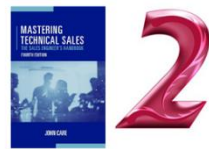
8 Stop Treating Every Deal the Same

> *"Sometimes the right answer is to walk away early – That is how we win the right ones."* – Global SE Leader, Technology Infrastructure Company

> *"You cannot put the same effort into every deal – you'll burn out and miss the big ones."* – Regional SE VP, Data Company

9 Stop Trying to Be the Smartest Person in the Room

> *"We have too many SEs who want to prove they're clever instead of helping the customer think."* – EMEA SE VP, Software Company

> *"Make the customer look smart – That is how you earn trust."* – EMEA SE Leader, Open–Source Software Company

10 Stop Avoiding Commercial Conversations

> *"If you do not understand the commercial motion, you cannot influence it."* – Global SE Leader, Enterprise Infrastructure Firm

> *"Too many SEs think talking about cost is sales' job – it's everyone's job."* – Regional SE Leader, Cloud Vendor

SE leaders agree that progress can often begin with subtraction. When teams stop over-explaining, over-engineering, and over-accommodating, they create the space for genuine curiosity, commercial focus, and co-creation with customers.
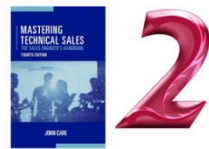
AI and the Evolving SE Role

Across interviews, presales leaders saw AI as an accelerant, a way to extend reach, sharpen preparation, and refocus energy on the customers' conversations that matter. As one global SE leader put it, *"AI won't take your job. But someone who knows how to use AI probably will."*

What AI Is Already Doing for SEs Today

AI has already become part of the daily rhythm of presales. Several leaders noted teams using it to do what once drained time: summarising discovery notes, researching customers and drafting RFP responses. A regional SE leader from a cloud services company smiled when asked what difference it makes:
"It's like having a silent partner who never sleeps and always shows up prepared."

Turning Discovery into Co-Creation

An EMEA CTO from a global data platform provider described how AI has turned customer discovery into design.
"The moment we show a customer their own data interpreted by AI including their patterns, their anomalies, the conversation moves from what our platform does to what their business could become." Instead of showing slides, his team opens a live workspace where the customer tests ideas and prototypes outcomes.
"AI lets us build a model, test an idea, and measure business impact in the same session. Each session feeds insights back to engineering within hours. Every customer experiment becomes a data point. The SE sits right in the middle of that feedback loop." For this leader, AI hasn't replaced discovery; it has made it real-time and collaborative.

What AI Could Do in the Future

Many leaders predicted that AI will soon move further into the commercial motion, handling renewals, usage-based expansions, or the first turn of a transactional deal.

"AI could close simple expansion deals on its own; usage goes up, value is proven, contract renews. That is not science fiction anymore." – Global SE Leader, Cloud Infrastructure Company

A regional SE VP from a SaaS provider described AI as the new *"commercial co-pilot."*
*"It'll spot signals – consumption drops, new champion joins – and tell you what to do next."*
Others agreed that for routine motions, AI may soon act faster than people:
"In renewals and add-ons, it'll know when to upsell, when to discount, when to escalate." – Regional SE Leader, CRM Platform Vendor.

But no one believed machines could replace judgment in strategic opportunities.
"AI might tell you who to call. It won't get invited to the boardroom." – EMEA SE Leader, Data and Analytics Provider.
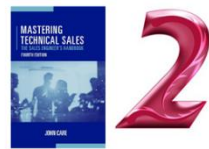
They imagined three directions for growth:

1. Automated Commercial Motions – usage triggers and renewals executed autonomously.
2. Predictive Deal Intelligence – live data anticipating risk and opportunity.
3. Customer Co–Pilots – AI assistants that let buyers model outcomes instantly.

The Human Element and the Limits of AI

Again and again, leaders emphasized, however advanced AI becomes, it still can't do the one thing that closes a deal, making people believe and trust in a solution.

"You can automate almost everything except empathy. That is still what earns trust." – Global SE Leader, Cybersecurity Provider.

"AI can read words, but not the room. It doesn't see the hesitation in a customer's eyes or the silence that tells you something's wrong." – EMEA SE Director, Infrastructure Provider.

"There's a big difference between data and judgment. AI can give you data. It cannot tell you when to push, when to pause, or when to walk away." – Global Presales VP, Software Company.

"The best SEs change the temperature in the room. That is not about data – That is presence." – Global SE Leader, Technology Firm.

These voices echo the same principle: customers buy confidence, not code. AI can assist with the message, but only people make it believable.

Leaders stressed the enduring importance of building towards a trusted advisor status. As an EMEA SE Director stated, deals still hinge on one question: *"Do I trust this team in front of me?"* The SE of the future must still earn that trust through preparation, consistency, and deep business understanding; because when every vendor sounds intelligent, credibility and character will become even more important differentiators.

What AI Can, Could, Cannot and Will Not Do

What AI Can Do Now	What AI Could Do in the Future	What AI Cannot Do (Yet)	What AI Will Never Be Able to Do
Summarise meetings, generate briefs, draft proposals.	Predict deal health from engagement and usage data.	Read body language, sense emotion, navigate politics.	Build trust, deliver on promises, or take responsibility.
Automate demo environments and datasets.	Offer real-time coaching during live calls	Conduct true discovery that uncovers unspoken needs.	Replace empathy, curiosity, or ethical judgment.
Analyse usage to suggest upsell opportunities.	Handle volume sales deals	Understand humour, nuance, or culture.	Replace human emotion in storytelling.
Provide translation, transcription, language support.	Recommend team strategies based on historical patterns.	Handle ambiguity or incomplete information with confidence.	Take accountability when things go wrong.

Source: Mastering Technical Sales Research Interviews (July – September 2025)

New Skills for the AI-Powered SE

If AI handles more preparation, the SE's craft shifts toward interpretation and design. Several leaders noted that the future skill set will be a blend of digital fluency and emotional intelligence. A global enablement leader summarised it:
"Do not compete with AI – collaborate with it. Let it handle the routine so you can focus on the remarkable."

Tomorrow's essential skills include:

- Prompt Fluency – asking the right questions of AI to surface real insight.
- Critical Thinking – challenging AI's answers and validating context.
- Storytelling and Contextualisation – turning analytics into narratives executives remember.
- Ethical Awareness – navigating privacy, bias, and transparency.
- Co-Creation Facilitation – using AI tools live with customers to design and test ideas.

Human Trust as The Advantage

Presales will be working with AI as a tool to think faster, see further, and connect more deeply with customers. AI will accelerate research, summarise meetings, and surface insights, but

belief still belongs to people.

"AI can prepare you for the meeting," said a Global SE Leader. *"Only you can make the customer believe."* Leaders agreed that even in an AI enabled world, the customer's final decision will still come down to trust: *"Do I believe this team understands my business and will they deliver?"*
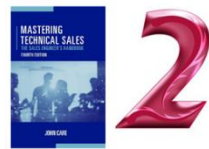
What's Top of Mind for SE Leaders

In 2025, senior SE Leaders are focused on scaling impact, strengthening alignment, and sustaining technical credibility in a cautious and increasingly fragmented world. Across interviews, several leaders noted a profession under pressure: how to expand reach without losing quality, prove business impact amid slower buying cycles, and maintain the curiosity and craftsmanship that make presales teams trusted and effective. What follows captures what is top of mind for SE leaders today; a blend of ambition, pragmatism, and resilience in an environment where expectations keep rising but resources do not.

Scaling Capability Without Diluting Quality

SE organizations everywhere faced a similar challenge: demand is growing faster than headcount. Leaders said the conversation has shifted from doing more to doing it differently; using more innovative coverage models, targeted enablement, and clearer prioritization.

"We're being asked to scale faster, lead smarter, and still deliver the same quality of experience – That is what keeps every SE leader up at night." – Global Head of SEs, Technology Company.

This leader explained that scaling is not only about automation or tooling but about focusing SE capacity where it creates the most impact, ensuring that senior engineers spend their time on strategic, high value engagements.

"We do not just add headcount; we change the mix. If you want to scale, it's about getting the right profiles and investing in their ramp up, not just hiring more bodies." – Regional SE Director, Global Infrastructure Provider.

Several leaders noted increasing scrutiny on utilization and productivity while protecting the craftsmanship that defines the SE role. Scaling, they said, is as much a mindset as a metric: building capability without losing quality, speed without sacrificing trust.

Driving Cross-Functional Alignment

Breaking silos and orchestrating across functions remains one of the most persistent challenges for SE leaders. They said the SE can become the connective tissue that links sales, product and customer success, the person who translates between agendas and keeps everyone focused on the customer outcome.

"Sales thinks about closing, Product about roadmap, Success about adoption – the SE has to connect all three." – Global Presales VP, Technology Solutions Provider

"The SE has to understand not only how to win the deal, but how the customer will adopt and get value afterward. That is where alignment with Customer Success starts before signature." – EMEA Presales VP, Enterprise Software Company.
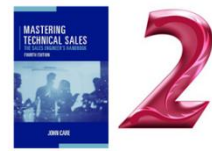
Many noted that effective alignment now depends on rhythm and transparency: joint planning sessions, shared success metrics, and open communication between presales and post–sales teams. As one leader said, this is what separates a good presales function from a great one: the ability to join the dots before the gaps appear.

Retaining Technical Credibility While Growing Influence

As SEs engage higher in customer organizations, leaders worry about drifting too far from the technology that underpins trust. Across companies and regions, they were unanimous that technical credibility remains the foundation of influence.

"You cannot earn trust in the boardroom if you've lost it in the lab." – Global SE Leader, Open–Source Software Company.

"Our best people have a passion for technology – they're always learning. You can see it in how they show up with customers; they're credible because they care." – Global Solutions Consulting Leader, Cybersecurity Company.

Several leaders noted this as an ongoing balancing act: enabling SEs to participate confidently in executive conversations while ensuring they remain hands-on with the latest technology. Examples were provided of reinforcing continuous learning, lab time, and peer-to-peer knowledge exchange – simple practices that keep curiosity alive. Over 70% of leaders emphasized that influence starts with technical depth, and the SE's voice carries weight only when it rests on genuine technical mastery.
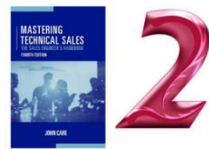
Measuring SE Impact and Demonstrating Value To The Business

Leaders agreed that presales measurement has not kept pace with the role's value creation. Traditional activity-based metrics, such as demos and proofs of concept, fail to capture how SEs influence buying decisions, renewals, and adoption.

"We've been working on connecting what SEs do to what matters; pipeline quality, win rates, renewal growth. That is what gets leadership attention." – Global Head of SEs, Technology Company.

"We need to move away from counting demos to counting the decisions we influence." – Global SE Leader, Cybersecurity Company.

Several leaders said that showing SE impact now means linking technical work to commercial outcomes, such as how quickly customers deploy, expand, or renew. Some teams are experimenting with new scorecards that pair adoption metrics with customer satisfaction and retention. The challenge is cultural as much as analytical: teaching organizations to value influence over activity, and to see presales as a sustained driver of customer success, not just a step in the sales cycle.

Leading in a Less Open World

Several leaders observed that the global economy itself has become less open. Cross-border mobility, shared demo environments, and regional collaboration all face new friction.

"It used to be easier to build global teams and move talent – now everything feels more regionalized. It's forcing us to think differently about how we collaborate." – Global Head of SEs, Technology Company.

"We're trying to keep that cross–regional collaboration alive even when travel is harder. A lot of our knowledge sharing now happens virtually – teams in different countries exchange use cases and lessons learned." – EMEA Presales VP, Enterprise Software Provider.

Leaders said this fragmentation has made them more deliberate in their communication and in local empowerment. Global presales organizations are learning to balance consistency with flexibility by focusing on a common purpose while adapting execution to regional realities.

SE leaders in 2025 are managing a profession that sits at the intersection of growth and constraint. They are scaling smarter, aligning deeper, and fighting to preserve the curiosity and technical excellence that give the role its authority. The market may be cautious and the world more complex, but as one global SE leader reflected:

"We talk about tools and transformation, but what's really top of mind is how to build teams that can keep evolving without losing who they are." – Global SE Leader, Open–Source Software Company

Future Skills for the SE Profession

Leaders were asked to select up to three capabilities they believe will define the Future-Ready SE. Many of these future focused skills directly align with the high-performing traits described in Section 3 – curiosity, commercial thinking, influence, presence, and ownership. Together, they reinforce that the next generation of SE excellence will be built on how effectively SEs create business value in partnership with customers. While technical mastery remains foundational, it is no longer differentiating. The focus is shifting toward behaviours that drive value creation, collaboration, and confidence in complex customer environments.

Top Future-Ready SE Skills and Behaviours (Leader Selections)

Rank	Future-Ready SE Skill / Behaviour	# of Selections (n = 38)	% of Leaders Selecting
1	Curiosity, Creativity and Agility	25	66 %
2	Business Value Discovery and Value Co-Creation	20	53 %
3	Customer and Internal Influence & Collaboration	16	42 %
4	Presentation Skills – Improvisation, Storytelling	14	37 %
5	Strategic Planning and Thinking (Account Planning)	11	29 %
6	Ownership – Holding Themselves and Others Accountable	9	24 %
7	Sales / Business / Commercial Acumen	9	24 %
8	Objection Handling and Negotiation Skills	6	16 %

 (37% of leaders felt skills such as objection handling and sales acumen would fall under value – cocreation and influence)

Source: Mastering Technical Sales Research Interviews (July – September 2025)
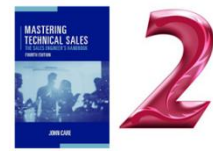
Call-out – Account and Opportunity Planning

While most leaders focused on curiosity, influence, and value co-creation, a few highlighted strategic planning and thinking as one of the most under-discussed yet defining capabilities for the future SE. An EMEA Presales Vice President explained:

"I hesitate between the strategic planning and thinking because at the end of the day, there's a lot of that that needs to go on. Sometimes you need to plan correctly, so you need to be ready to actually sell something for $500 000 in order to sell, two years down the line, a $20 million system. And that is what I put behind the strategic planning and thinking." A Regional SE Director placed it alongside curiosity and ownership as a core differentiator:

"Ownership, agility, curiosity, and strategic planning and thinking. ... I'm of the mind that you only get one opportunity to screw the customer. So, if you screw up in a big way, you're going to get someone fired and destroy our brand at that customer."
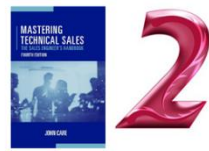
Leaders emphasized that future SEs must shape account strategy with sales, establishing a regular cadence of joint reviews to map stakeholders, anticipate challenges, and plan influence early. One leader described how setting up a quarterly rhythm of SE – Sales account planning meetings transformed alignment, helping the team shape opportunities proactively rather than reactively. Strategic SEs do not wait to be invited into account planning; they help design it. The ability to connect short-term actions to long-term outcomes separate those who support deals from those who influence sustained customer success.

Where Leaders Would Invest

When asked where they would invest to strengthen SE capability, leaders pointed to the soft skills (or, as Mastering Technical Sales refers to them, Professional Skills) side of the role including storytelling, influence, business acumen, and strategic thinking. A Regional SE Vice President put it bluntly: *"If I had money to invest, I'd put it all into the soft skills – presentation, communication, storytelling, and influence. "* A Global SE Leader added: *"We've done a great job hiring smart engineers. Where we fall short is connecting them to the business conversation – how to talk value, not features."* The Global Head of SEs at a major technology company echoed the same gap: *"The SE's gap isn't in technical knowledge; it's in relevance – being able to translate what they know into what matters to the customer."* Several leaders highlighted the need to invest in confidence and influence, so SEs lead more assertively within the sales cycle:

"Our SEs sometimes see themselves as passengers in the sales cycle. I'd invest in building their confidence and capability to lead the conversation to own their half of the deal." – Global Enablement Leader.

Finally, leaders called out strategic planning as an area requiring investment:

"We do not teach SEs how to plan – how to think ahead about the account, the renewal, the expansion. That is where we'd get the most return – teaching them to anticipate and design the next step before Sales asks." – Regional SE Director, Technology Infrastructure Company. If given additional investment, leaders would channel it toward helping SEs sound less like experts and more like trusted advisors who shape the customer's strategy.

Conclusion – The Trust Advantage

The research underscores a simple truth: technology will continue to evolve, but trust remains constant. Leaders emphasized that the future of presales belongs to those who co-create value, influence outcomes, and build belief.

AI will accelerate preparation and insight, and it is very likely to take over many aspects of the technical-expert role: gathering data, validating configurations, and generating demos faster and more accurately than any human ever could. But what AI cannot take over is the role of the value co-creator, the sales engineer's ability to connect, interpret, and build confidence with the customers.

High-performing SEs are already proving that their greatest advantage is not just what they know, but how they help customers imagine what's possible, combining technical depth with business fluency, creativity and a commercially outcome based focus.

The Sales Engineer of the future will be a trusted value co-creator, able to bridge the gap between technology and business to co-create solutions customers never imagined and earn the customers' trust to make those solutions real.

"At the end of the day, people are still people. If I'm running a large enterprise, I want to look someone in the eye, shake their hand, and believe that they care about what I'm trying to achieve. I just don't see how you get that from a chatbot or from AI - not anytime soon, if ever" Global SE VP, Open-Source Software Company
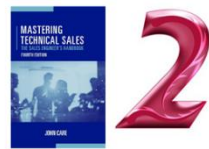
Leader Actions – Building Future Ready SE Teams

1. **Reinforce the Human Edge**

- Develop trusted advisor and business value co-creation skills as core differentiators.
- Coach SEs to listen, simplify (storytelling and visual selling), and inspire confidence - skills AI cannot replicate.
- Recognize and reward behaviours that develop a trusted advisor status with customers.

2. **Scale Capability Through Focus and Enablement**

- Use AI and analytics to free capacity for strategic, high-value customer work.
- Protect "craft time" for continuous technical learning and experimentation.

3. **Strengthen Strategic Influence and Account Planning**

- Teach SEs to shape account strategy proactively, identifying long-term customer value, mapping stakeholders, anticipating risks, and aligning with Account Executives, Product, and Customer Success.
- Create regular AE–SE planning cadences to drive long-term customer outcomes, not just short-term wins.

4. **Integrate AI as an Amplifier**

- Equip teams with prompt fluency and critical-thinking skills to challenge and interpret AI outputs.
- Build ethical and transparent use standards for AI in presales work.
- Encourage co-creation with customers using live AI tools to design and validate ideas together

5. **Redefine SE success metrics to reflect quality, not just quantity, focusing on:**

- Pipeline influence and conversion rate, not just the number of demos.
- Time-to-value and adoption rates, not only bookings.
- Peer coaching and knowledge-sharing contribution

6. **Preserve a Culture of Curiosity and Learning**

- Maintain peer and community learning and cross-regional collaboration even as organizations scale.
- Celebrate curiosity and shared learning as the foundation of influence and credibility.

About Mastering Technical Sales

Mastering Technical Sales, part of the *Up 2 Speed Group*, is one of the leading global authorities on presales excellence. Founded by John Care to elevate the impact of Sales Engineers, MTS provides practical frameworks, workshops, and coaching that help technical sales professionals connect technology to business value and become trusted advisors. Through its global network of consultants and proven methodologies, Mastering Technical Sales has equipped tens of thousands of SEs to communicate with confidence, influence with credibility, and drive measurable customer outcomes. Learn more at www.masteringtechnicalsales.com

Mastering Technical Sales – Consultative Selling Curriculum

Specialty Skills (Mini Workshops)
- MTS 075v Remote Mastery Essentials
- MTS 328 Not Everyone Is Like You

Fundamental Skills
- MTS 100 Boot Camp/ New Hire Workshops (Custom)
- MTS 101 Sales Kick-Off Mini Sessions
- MTS 102 The Demonstration Workshop
- MTS 103v The Demonstration Workshop
- MTS 104 Business Value Discovery for Sales Engineers
- MTS 105 Presentation Mechanics for Sales Engineers
- MTS 107 The Special Challenge of SE Specialist/ SME Teams

Applied Skills
- MTS 102/201 Workshop - Demos & Technology Discussions Mechanics
- MTS 202 The Webcast Workshop
- MTS 204 Selling Solutions for Sales Engineers
- MTS 205 Answering Questions (aka Objection Handling)
- MTS 223v Effective Remote Presentations & Demonstrations
- MTS 224 Creating The Memorable Demonstration
- MTS 302 White Boarding for the Sales Engineer
- MTS 302v The Fine Art of White Boarding

Advanced Skills
- MTS 301 The Perfect Pitch Master Class
- MTS 303 White Board Design & Creation
- MTS 304 The Executive Connection
- MTS 306v White Boarding For Sales
- MTS 307 The Trusted Adviser Sales Engineer
- MTS 308 The Trusted Advisor Account Executive
- MTS 341v Storytelling for the Sales Engineer
- MTS 344v The Improvisational Sales Engineer
- MTS 345 Negotiation & The Sales Engineer
- MTS 350v The Executive Connection (Improv Version)

Mastering Technical Sales – Presales Leadership Curriculum

Know And Manage Yourself 'Rule 0 Courses'
- MTS 401 Your Most Important SE - You
- MTS 403 What Got You Here Won't Get You There
- MTS 406 The Art Of Saying "No"
- MTS 407 The Trusted Manager
- MTS 409 Not Everyone Is Like You

Develop And Serve Your People 'Rule 1 Courses'
- MTS 411 Introduction to "Develop And Serve Your People"
- MTS 413 Developing A Culture Of Coaching
- MTS 414 Coaching First Line Managers
- MTS 415 Coaching For A Specific Initiative
- MTS 416 The Power Of Feedback
- MTS 417 Teamwork/Roles & Rules Of Engagement
- MTS 419 Coaching the Demo, Presentation, POC

Run Your Business As A Business 'Rule 2 Courses'
- MTS 421 Creating and Using Metrics
- MTS 423 Effective Time Management
- MTS 425 The Team Brand
- MTS 426 Reviewing And Streamlining SE Processes
- MTS 427 The Sales Engineer Quarterly Business Review
- MTS 429 Technical Account Planning

Serve & Delight Your Customers 'Rule 3 Courses'
- MTS 431 Selling As (or Being) An SE Manager
- MTS 435 The Executive Connection
- MTS 439 Preparing For The Sales QBR

Appendix A - Participant Overview

This appendix provides an anonymized overview of the 38 participants interviewed between July and September 2025. Participants represent senior SE and Presales leaders across regions and technology sectors, offering a balanced view of global perspectives.
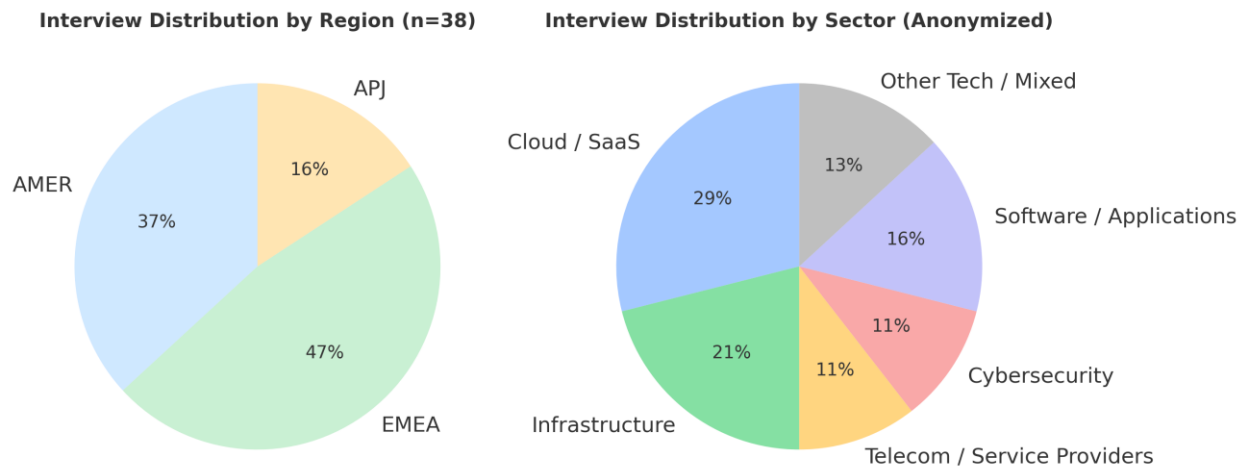

Appendix A — Participant Overview

Interview Distribution by Region (n=38) | Interview Distribution by Sector (Anonymized)

Figure A1 – Interview Distribution by Region and Sector

Anonymized Sector Breakdown

Sector	Number of Participants
Cloud / SaaS	11
Infrastructure	8
Telecom / Service Providers	4
Cybersecurity	4
Software / Applications	6
Other Tech / Mixed	5

Regional distribution: AMER (14), EMEA (18), APJ (6). Sector classifications are anonymized to preserve confidentiality while illustrating the breadth of industry representation.

Source: Mastering Technical Sales Research Interviews (July – September 2025)