



Presales Support & Process

The missing links in software sales

by: Kristal Cook, RockRoot

One of the biggest challenges dealerships face when trying to grow software revenue usually has very little to do with the software itself. A lot of dealerships look for software that “sells itself.” The reality is, how you sell software is just as important as the software itself. In many cases, the real issue is what happens between identifying an opportunity and successfully closing and implementing it. Those missing pieces are often presales support and process.

Most dealerships already have strong sales teams, solid customer relationships and valuable software offerings. What they often lack is a clear structure for supporting software opportunities as they move through the sales cycle. Without that structure, software becomes inconsistent, difficult to scale and overly dependent on the software vendor or a few technical individuals.

This is one of the most common gaps in software sales strategies across the office technology industry. A rep uncovers a potential software opportunity but is unsure how to position it confidently. He (or she) may hesitate to bring it up because he does not want to get too technical or feel like he needs every answer immediately. If the opportunity does move forward, the process often becomes unclear. Who handles discovery? Who schedules the demo? Who owns the proof of concept? Who coordinates the installation? What happens after the sale? When those answers are not clearly defined, opportunities tend to stall.

One of the biggest misconceptions in the office technology space is that sales reps need to become software experts. They do not. The goal is not to turn copier/MFP reps into engineers. The goal is to help reps recognize business problems, start meaningful conversations and confidently pull in the right resources at the right time. That is where presales support becomes critical.

Strong presales support gives reps confidence because they know they are not handling opportunities alone. They understand who to involve in demos, technical validation, pricing assistance, implementation planning and customer onboarding. Instead of avoiding software conversations because they feel too technical, reps begin viewing software as a natural extension of the customer conversation.

One of the most effective ways to improve software consistency is by building a repeatable support structure around the sales process. This includes clearly defining:

- Discovery and qualification processes



- Demo request workflows
- Vendor coordination
- Proof-of-concept expectations
- Installation ownership
- Customer success follow-up
- Renewal and recurring revenue management

When these areas are organized, software opportunities move more quickly and more consistently.

I also recommend creating simple one-pagers for each part of the process that are both sales rep and customer facing. This gives sales reps a talk track and a process they can comfortably follow, while also helping to set realistic expectations for the customer. It keeps everyone aligned and creates a more smooth experience from discovery through implementation. Most software vendors are willing to help build these resources; all you need to do is ask them.

Another challenge a lot of dealerships run into is treating software support reactively instead of proactively. Reps are often expected to “figure it out” as opportunities arise. Over time, that creates delays, inconsistent customer experiences, and burnout for both sales and technical teams. Software sales should function more like a system.

For example, if a rep identifies a health-care customer struggling with secure document workflows, there should already be a defined path:

- (1) Identify the business problem
- (2) Pull in the appropriate internal or vendor resources
- (3) Schedule discovery and demo support
- (4) Build a simple packaged solution

- (5) Define implementation ownership
- (6) Plan onboarding and customer success follow-up

This structure removes uncertainty and allows dealerships to scale software sales more effectively.

The best software opportunities typically happen when dealerships collaborate with vendors from the beginning of the sales process. Bringing vendors into the process early allows them to assist with discovery, positioning, demos and technical guidance before opportunities become rushed or reactive. Coordinated communication, qualified opportunities and clear expectations create a better experience for the dealership, the vendor and, ultimately, the customer.

Perhaps most importantly, a strong support process improves customer confidence. Customers do not want to feel like they are navigating multiple disconnected teams just to solve one business problem. They want a trusted expert who can guide them through the process clearly and professionally.

That is one of the reasons RockRoot focuses heavily on simplifying software sales. The dealerships that grow software successfully are rarely those with the most products. They are usually the dealerships with the most clear processes, the strongest alignments and the best support structures behind their sales teams.

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strong support before and after the sale. The dealers who understand that are the ones building stronger recurring revenue, larger bundled deals and better long-term customer relationships for the future. ■

Kristal Cook is a solutions sales executive and the founder of RockRoot, where she helps office technology dealerships grow profitable software revenue with confidence.

Through RockRoot, Cook serves as a virtual solutions director, providing leadership alignment and onboarding, solutions portfolio evaluation, vendor coordination, sales enablement and presales support. Her work includes assistance with demos, trials and POCs, installation supervision, customer training, and the creation of customized sell sheets and sales resources. With a dealer-first approach, Cook aligns software strategy to each dealership's KPIs, goals and priorities.

RockRoot offers a "Virtual Solutions Director" package for dealers who would like to bring a software veteran on board to help them drive software growth. If you would like training and alignment for your current leadership, RockRoot offers a software sales growth course with a workbook to create a tangible, actionable plan to implement, and includes coaching sessions. Cook can be reached at kcCook@rockroot.biz.

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