NORTH AMERICAN ASSOCIATION OF SALES ENGINEERS

# THE SALES ENGINEER LEVERAGE AUDIT

The lifecycle can be used as a practical audit for an individual SE or an entire team. Start with one recurring problem, not a broad initiative.

## 1. What keeps coming back to you?

Look at repeated questions, demo requests, POC delays, escalations, onboarding gaps, and field issues. Frequency is useful, but also consider cost and strategic importance.

## 2. What judgment are you applying that others cannot see?

Write down the signals, decision rules, tradeoffs, and exceptions behind your response. Do not stop at the final output.

## 3. What is the smallest reusable mechanism?

Choose a form that fits the user and moment. Avoid building a large platform before testing whether a checklist, example, short video, or guided workflow is enough.

## 4. Who needs to adopt it?

Name the specific user and situation. Decide how the mechanism will enter the existing workflow, who owns it, and what training or permission the user needs.

## 5. What would prove that it worked?

Select evidence tied to the original friction. Possible measures include time saved, reduced rework, faster ramp, improved conversion, shorter evaluation cycles, higher consistency, broader adoption, or better customer outcomes.

## 6. How will it improve after use?

Establish a lightweight feedback loop. Review failed uses as carefully as successful ones. Remove steps that do not help, add context where users make predictable mistakes, and retire the mechanism when it no longer reflects reality.

A good first leverage project should be narrow enough to test quickly and important enough that improvement will be visible. The aim is not to document everything an SE knows. It is to identify one recurring dependency and reduce it responsibly.

Read the full NAASE Perspective: **The Sales Engineer Leverage Lifecycle**