





At Nae, we have supported our clients in transforming their pre-sales functions across organization, governance, processes, tools, and AI

Levels	1 Reactive 	2 Standardized 	3 Orchestrated 	4 Intelligent 
Challenges	<ul style="list-style-type: none"> • Define a minimum pre-sales team and assign clear responsibilities (RACI) • Document and standardize the pre-sales process, including scope, milestones, and internal SLAs • Build a basic library of service templates (technical, commercial, and SLA-related) • Introduce collaboration tools and a shared repository • Start identifying and qualifying priority partners • Introduce bid/no-bid criteria and basic pipeline tracking 	<ul style="list-style-type: none"> • Establish a dedicated pre-sales function with clear leadership (Bid Manager) and defined roles • Implement end-to-end processes and internal SLAs, while consolidating a shared template library with assigned ownership • Introduce generative AI tools and train teams on their use • Define a foundational partner program with collaboration models and selection criteria • Measure productivity and win rate using operational dashboards and KPIs • Centralize proposal and use-case information in a shared repository 	<ul style="list-style-type: none"> • Coordinate pre-sales with sales, product, marketing, and operations through a cross-functional governance model • Engage opportunities before the RFP is officially released in coordination with the sales organization • Plan capacity and workload to reduce proposal preparation lead times • Incorporate <i>post-mortem</i> reviews and periodically update processes and templates • Introduce specialized AI tools for pre-sales • Develop joint solutions with partners and coordinate go-to-market initiatives 	<ul style="list-style-type: none"> • Establish OKRs and continuous improvement cycles aligned with business objectives • Scale personalization through solution- and vertical-specific playbooks • Introduce advanced analytics for bid management • Integrate pre-sales insights into demand generation and business development • Transform pre-sales into a growth-oriented capability focused on creating new business opportunities

Improving pre-sales maturity typically results in **higher win rates, shorter proposal lead times, and stronger business generation capabilities.**