

How to Expand Presales Influence on Product

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Introduction

From “Whack-a-Mole” to Shaping Roadmap



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Solutions Engineers (SEs) have an unmatched understanding of customer pain points and product gaps, but we often find it challenging to influence the roadmap.

One of my favorite sayings goes, “Solutions Engineers know more about Product than Sales, and know more about Sales than Product.”

By doing the Solutions job well, we understand our customers better than anyone else, but we are often in the same cycle: demos, RFPs, expansions, repeat. This repetitive motion limits our opportunity to surface product insights, which are too often left untapped by the one team that would benefit most from them: Product.

Our recent **2025 Solutions Engineering Career Guide**, based on a survey of more than 400 SEs, reveals the disconnect:

- **82% of SEs say they should collaborate with Product “often” or “constantly”**
- **Only 66% currently do**

Most SEs do not have access to Product in a way that moves the needle. SEs often submit feature requests, feedback, or bugs to what can feel like a black hole.

The truth is, Product teams want this front-line feedback and expertise from SEs, but incorporating this into their workflows and sprints isn’t easy.

Think of it like playing whack-a-mole. A bug fix here, a usability issue there. It’s necessary work, but it doesn’t solve the root causes to prevent future problems, and it fails to take advantage of the SE’s unique expertise.

There’s a better way.

Solutions teams can — and should — play a strategic role in shaping the product roadmap, improving feature prioritization, and enhancing the customer experience. With the right structures in place, SEs can help the Product team develop a deeper understanding of the market and increase product adoption, ultimately helping the organization win more deals.

How Solutions Teams Influence Product Success

- ✓ Better alignment between product features and real-world market needs
- ✓ Accelerated adoption and stickier user experiences
- ✓ Improved competitive advantage and differentiation

This guide offers a framework to shift your team from reactive bug fixes to roadmap influence.

Let’s dive in.

Step 1

Set Goals and Align with Product Teams

Just as SEs align with Sales to close new business, they also need to align with Product to shape what gets built. The first step in expanding SE influence on Product is setting intentional goals that tie into product roadmap planning.

1. Align with Product Development Goals

Ask yourself: How can we ensure SEs are providing the Product team with repeatable, measurable, and scalable insights rather than one-off asks?

Identify patterns

Start by identifying patterns in reasons for lost deals, delayed implementations, or repeated onboarding challenges. These patterns often signal misalignment between what the market needs and what the product delivers. SEs know best how the product's capabilities live up to customer expectations.

Communicate early and often

Once you've identified those patterns, schedule regular touchpoints where SEs can share what they're hearing in the field. Your goal is to become a trusted partner through regular communication.

2. Participate in Roadmap Planning

Ask yourself: How can we move from inputting ad hoc feature requests to influencing the roadmap?

Add your expertise to roadmap sessions

For example, compile structured summaries of top feature requests from demos. Pair this with demo data or loss reasons that support the urgency and impact of the customer's ask.

Create cross-functional alignment

To influence roadmap decisions, SEs need strong relationships across Product, Customer Success, and Engineering teams. Consider setting up a council that involves all of these stakeholders (we'll describe that approach in the next section). Today's custom solution might be tomorrow's top roadmap priority.

3. Help with Product-Market Fit

Ask yourself: Are we feeding Product Managers (PMs) enough data to refine the target user?

Identify the signals

SEs have access to buyer needs that shape product-market fit: Which features close deals? Where do customers get stuck? Which workflows require constant SE intervention?

Refine the Ideal Customer Profile (ICP)

Use this data to help the Product team refine user personas, inform pricing and packaging decisions, and prioritize features that drive both deal velocity and customer satisfaction.

Step 2

Collaborate with Product to Expand Influence

SEs can't influence product direction by sending one-off Slack messages or logging tickets. Real influence requires structure, shared language, and regular engagement with the teams actually building the product. Much like it is with customer retention, the solution is to move from transactional interactions to ongoing collaboration. Measurable data really helps here.

Establish a Product Influence Council

To establish a meaningful partnership between Product and Solutions teams, consider creating a **formalized Product Influence Council**. The council should act as a structured venue where SEs provide insight, share trends, and participate in roadmap conversations.

Participants

SEs, PMs, Product Marketing Managers (PMMs), Engineering Leads

Format

Bi-weekly or monthly review sessions + async collaboration via Slack or Teams

Define the Charter

Create a charter document outlining what you hope to accomplish. For example, it should include the following:

Purpose

Incorporate Presales insights in product development.

Goals

- Share technical work-arounds being used to get deals in the door.
- Stack-rank opportunities with technical roadblocks.
- Influence feature-request prioritization based on prospect demand.

Set a Meeting Agenda

Customize this example meeting agenda to make this council fit your organization's needs.

- Review customer feedback and demo data.
- Prioritize key feature requests by impact.
- Align on upcoming product releases and customer relevance.
- Coordinate beta testing or early access programs.

Establish Solutions-Driven Product Enhancements

As an outcome from the council, SEs can own or co-lead several initiatives that bring Product teams closer to customers. These programs help Product hear what SEs hear every day in their customer interactions, and they make Product better as a result. In our experience, Product teams are hungry for this level of feedback from the field.

Product Feedback Portals

SEs engage with dozens of customers every month and often hear similar feedback that could benefit the entire user base. A structured feedback portal gives SEs a dedicated channel to submit those insights in an organized, digestible way. Tools like [Pendo](#) or [Aha!](#) allow SEs to **tag feedback by persona, deal size, industry, urgency, and even competitive context**.

When Product teams can easily filter this feedback, they get a clearer picture of which themes are bubbling up across multiple deals. Over time, these insights inform prioritization and provide evidence for investing in widely requested features.

Product Feedback Days

Field feedback often comes in fragmented and sporadic ways. “Product Feedback Days” offer a structured, quarterly opportunity to **zoom out and look at the big picture**. These collaborative sessions bring together representatives from Solutions, Sales, Marketing and Product teams to review patterns from the past quarter.

Customer Feedback Panels

While internal feedback is valuable, nothing replaces the voice of the customer. SEs are well-positioned to **host technical advisory panels** made up of strategic customers and power users. These panels provide opportunities for long-form conversations about what’s working, what’s not, and where the product should go next. These discussions surface important insights like friction in complex workflows, edge cases, or new functionality that gives your product a competitive edge.

Sales and Product Office Hours

Some of the **best feedback happens in informal moments** like the conversation after a tough demo, or the quick call when a deal stalls. Sales and Product Office Hours bring these insights straight to the Product team. In these recurring, low-pressure meetings, Sales, Solutions, and Product teams can share real-time observations.

SEs can highlight objections heard in the field, clarify how features are landing in competitive cycles, or raise usability concerns before they escalate. These sessions build cross-functional trust and often uncover trends that formal processes miss.

Each of these programs transform “we think this matters” into “we know this matters because our buyers and users are telling us.”

Step 3

Use Data to Validate SE Contributions to Product

Strategic influence is about both participation and proof. To show the impact of SE collaboration on the product, track meaningful metrics that tie back to adoption, roadmap alignment, and customer satisfaction.

1. Feature Request Success Rate

Why it matters: By tracking this metric, you can demonstrate the tangible influence SEs have on shaping the roadmap — and which types of requests are most likely to be prioritized.

What it is

The percentage of SE-sourced feature requests that the Product team implements.

How to track it

Maintain a shared backlog where you log and link SE-tagged requests to deals or customers. Update the status regularly and review the percentage of fulfilled requests quarterly.

2. Product Adoption Growth

Customers realize product value through their adoption. If Solutions-led feedback leads to clearer UX, better onboarding, or more relevant features, it should translate into measurable usage growth.

What it is

The increase in customer adoption and usage of features that the Solutions team influenced through feedback or enablement.

How to track it

Monitor feature adoption rates before and after releases tied to SE input. Compare these trends across customer segments or use cases.

3. Roadmap Alignment Score

Why It Matters: This helps validate whether the Product team is building what the market needs, based on real feedback from the field. Low roadmap alignment scores signal a potential disconnect that needs attention.

What it is

A measure of how closely the published roadmap aligns with the top feedback themes identified by SEs.

How to track it

Assign tags or themes to SE-submitted feedback and compare them to published roadmap items. Calculate the overlap as a percentage each quarter.

4. Feedback Loop Efficiency

Why it matters: A fast, reliable feedback loop builds trust, shows that Product values field insights, and helps close the loop on communication.

What it is

The average time from when SEs submit feedback to when Product or Engineering reviews, triages, and either acts on or closes out the request.

How to track it

Timestamp all feedback submissions and measure the time to first acknowledgement and resolution. Analyze where bottlenecks occur.

When Solutions teams track and communicate their influence on product outcomes, they reposition themselves from tactical supporters to strategic contributors.

It's Time to Expand SE Influence on Product

SEs are more than deal enablers. They're market translators, insight aggregators, and frontline truth-tellers. Their influence over product decisions shouldn't be reactive, bespoke, or one-off. With the right goals, structures, and metrics in place, Solutions teams can proactively shape what the company builds and why.

Use this framework to:

- Build trust and alignment with Product
- Translate field signals into roadmap strategy
- Tie Solutions effort to product success metrics

You'll build a better product, stronger partnerships, and more successful customers.

Want more insights on how presales can expand their influence?
Check out the other guides in this series:

**How to Expand
Presales Influence
on Revenue**

**How to Expand
Presales Influence
on Retention**