

Measuring What Matters:

The SE Leader's Playbook for Proving Value



Your Solutions Engineering team helps to close more deals, accelerate sales cycles, and drive customer success. Yet when budget season arrives, you're still fighting to justify headcount with demo metrics and activity reports.

Here's the truth: The metrics you're tracking weren't designed for the value you're creating.

While your team shapes technical decisions, influences buying committees, and enables long-term customer outcomes, traditional sales KPIs miss the strategic impact that defines modern Solutions Engineering.

Drawing from real-world insights and proven insights, this playbook covers how SE teams can redefine success metrics to showcase true influence, secure executive buy-in, and build organizational credibility.

The Attribution Trap: Why Traditional Metrics Miss the Mark

Solutions Engineering teams are drowning in the wrong data.

Closed revenue? Doesn't capture the deals you saved from falling apart. **Demo counts?** Ignores the strategic guidance that accelerated buyer decisions. **Activity metrics?** Miss the post-sale value you're driving through customer success.

"It's not just about attribution — we track influence, buyer progress, and realized value."



John Joseph
Founder, HONA LLC

The reality is that **SE impact happens before, during, and long after signature.**

Traditional sales KPIs were built for a different role. They measure transactional activity, not the consultative influence Solutions Engineers have across the buying journey.

The New SE Scorecard: Metrics that Actually Matter

Leading SE teams are abandoning vanity metrics for measurements that reflect real influence.

Presales Excellence Indicators

POC Conversion Rate

The percentage of proof-of-concepts that convert to closed deals

Why it matters: Demonstrates your team's ability to prove technical value

Technical Win Rate

Deals won based on technical merit vs. competitive alternatives

Why it matters: Shows your influence on buyer decision-making

Deal Velocity Impact

How SE involvement affects sales cycle length

Why it matters: Proves your role in revenue acceleration

Post-Sale Value Metrics

Time-to-Value (TTV)

How quickly customers achieve measurable business outcomes

Why it matters: Connects SE efforts to customer success

Value Realized

Tangible business outcomes tied directly to SE-led initiatives

Why it matters: Quantifies long-term impact beyond the initial sale

Expansion Influence

SE role in driving upsell and cross-sell opportunities

Why it matters: Demonstrates ongoing revenue impact

"Value Realized measures the tangible business outcomes tied to SE-led efforts.. In PreSales, POC Conversion and Technical Win Rate are key indicators of SE effectiveness."



John Joseph

Founder, HONA LLC

Dashboard Revolution: From Activity Reports to Influence Analysis

OLD APPROACH: Track what SEs do


NEW APPROACH: Measure what SEs enable

The Integrated Impact View


Smart SE leaders are building dashboards that connect three critical data streams:

- Presales metrics: POC conversion, technical wins, deal acceleration
- Post-sale outcomes: TTV, value realized, expansion revenue
- Customer sentiment: NPS/CSAT scores specific to SE touchpoints

Quality Over Quantity Reporting

 **Stop measuring:**

- Number of demos delivered
- Hours logged in CRM
- Support tickets resolved

 **Start measuring:**

- Deal health correlation with SE involvement
- Revenue acceleration tied to technical guidance
- Churn prevention through SE relationship management

Key insight: Build reports that correlate SE actions to revenue outcomes, not just support volume.

Incentive Evolution: Aligning Compensation with True Impact

"SEs support both new revenue and expansion, so we built comp plans that reflect both."



John Joseph

Founder, HONA LLC

Beyond Quota Support

Traditional SE compensation ties entirely to new logo acquisition. Leading teams are evolving toward multi-dimensional models:

Balanced Scorecards

Blending metrics that reflect the full scope of SE impact across new revenue and expansion opportunities. For example:

- 60% new revenue metrics
- 25% expansion/retention influence
- 15% Customer Success outcomes

Cross-functional Recognition

- Rewarding collaboration with Customer Success
- Incentivizing sales team enablement
- Recognizing strategic account relationship building

Long-term Thinking

- Customer lifetime value weighing
- Value realization bonuses
- Retention rate multipliers

Team-based Incentives

Moving beyond individual contributor models to reward collective SE impact:

- Pod-based compensation structures
- Shared success metrics across SE specializations
- Recognition programs for cross-functional contribution

Making Your Case: How to Advocate for SE Value with Data

The Challenge: Getting executive attention for SE investment requires more than good intentions.

The Solution: Story-driven reporting that translates SE impact into business language.

Building Your Value Narrative

Step 1: Establish Baseline Impact

Document current SE influence on key business metrics

- Revenue acceleration correlation
- Deal quality improvement
- Customer satisfaction scores

Step 2: Create Executive-Ready Dashboards

Design reports that speak to C-suite priorities

- Revenue impact summaries
- ROI calculations for SE investment
- Competitive advantage metrics

Step 3: Build RevOps Partnerships

Co-own reporting frameworks to establish credibility

- Joint metric definitions
- Shared dashboard maintenance
- Collaborative analysis sessions

The Value Dashboard Blueprint

Executive Summary Section

- Total revenue influenced (not just attributed)
- Customer success metrics tied to SE involvement
- Competitive win rate improvements

Operational Metrics Section

- POC conversion trends
- Technical win rate by competitor
- Deal velocity analysis

Strategic Impact Section

- Value realized post-implementation
- Expansion revenue correlation
- Customer sentiment tracking

Your 30-Day Implementation Roadmap

Week 1: Assessment & Planning

- ☐ Audit current SE metrics and identify measurement gaps
- ☐ Interview key stakeholders on desired SE impact visibility
- ☐ Document existing data sources and integration possibilities

Week 2: Metric Definition

- ☐ Select 3-5 key influence metrics for your team
- ☐ Define calculation methods and data requirements
- ☐ Establish baseline measurements where possible

Week 3: Pilot Dashboard Creation

- ☐ Build initial dashboard with new metrics
- ☐ Test data accuracy and visualization effectiveness
- ☐ Gather feedback from SE team and sales leadership

Week 4: Stakeholder Alignment

- ☐ Present findings to RevOps and executive leadership
- ☐ Collect feedback and refinement suggestions
- ☐ Plan expanded rollout based on initial results

SE Metrics Glossary

POC Conversion Rate $(\text{Converted POCs} \div \text{Total POCs}) \times 100$

Technical Win Rate $(\text{Technical Wins} \div \text{Total Competitive Deals}) \times 100$

Deal Velocity Impact Average days saved/added per SE-involved deal

Time-to-Value (TTV) Days from contract signature to first measurable customer outcome

Value Realized Quantified business benefits achieved through SE-guided implementation

Expansion Influence Expansion revenue from accounts with active SE involvement

Your Path Forward

The teams winning budget battles and earning executive respect aren't the ones with the most activity metrics. They're the ones demonstrating clear correlation between SE involvement and business outcomes.

Executives don't care how many demos you delivered last quarter. They care about the **revenue you influenced and the customers you enabled**.



Ready to build metrics that matter?

TestBox can help you implement these measurement frameworks in your SE organization.

[Schedule a demo](#)