

WHAT IS THE AE ROLE, REALLY?

Becoming an AE:
Progression & Upskilling
for SDRs

Live session starts at
8am PT | 11am ET | 3pm UK

#SIAxBAAE



ICEBREAKER

**Have you listened to a
Discovery call yet?**



We'd love to hear about your progress!



Have you listened to a Discovery call?

- ① Start presenting to display the poll results on this slide.

LEARNING OUTCOMES



BY THE END OF TODAY'S CLASS, YOU WILL BE ABLE TO:

- 1. Define the role of the AE realistically and accurately
- 2. Develop questioning skills in preparation for discovery
- 3. Become familiar with the daily routine of an AE
- 4. Create a plan for the steps you can take now to get closer to your goal



LEARNING OUTCOME 1

Define the role of the
AE realistically and
accurately



CHAT BOX

What do you think the similarities and differences are between the SDR and AE roles?

THE ROLES

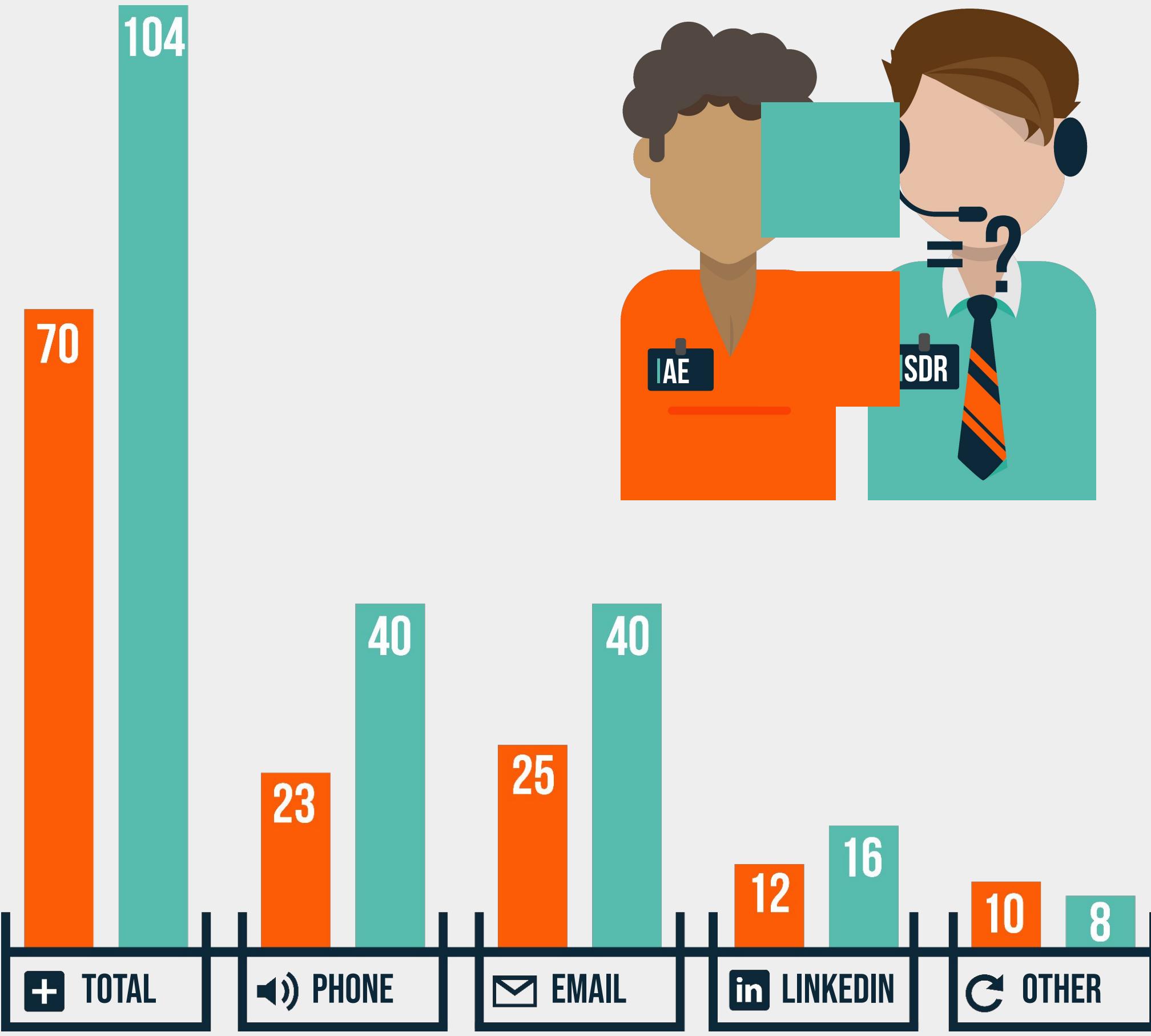


**“I am doing
all the hard
work!”**



**“I just closed
the deal!”**

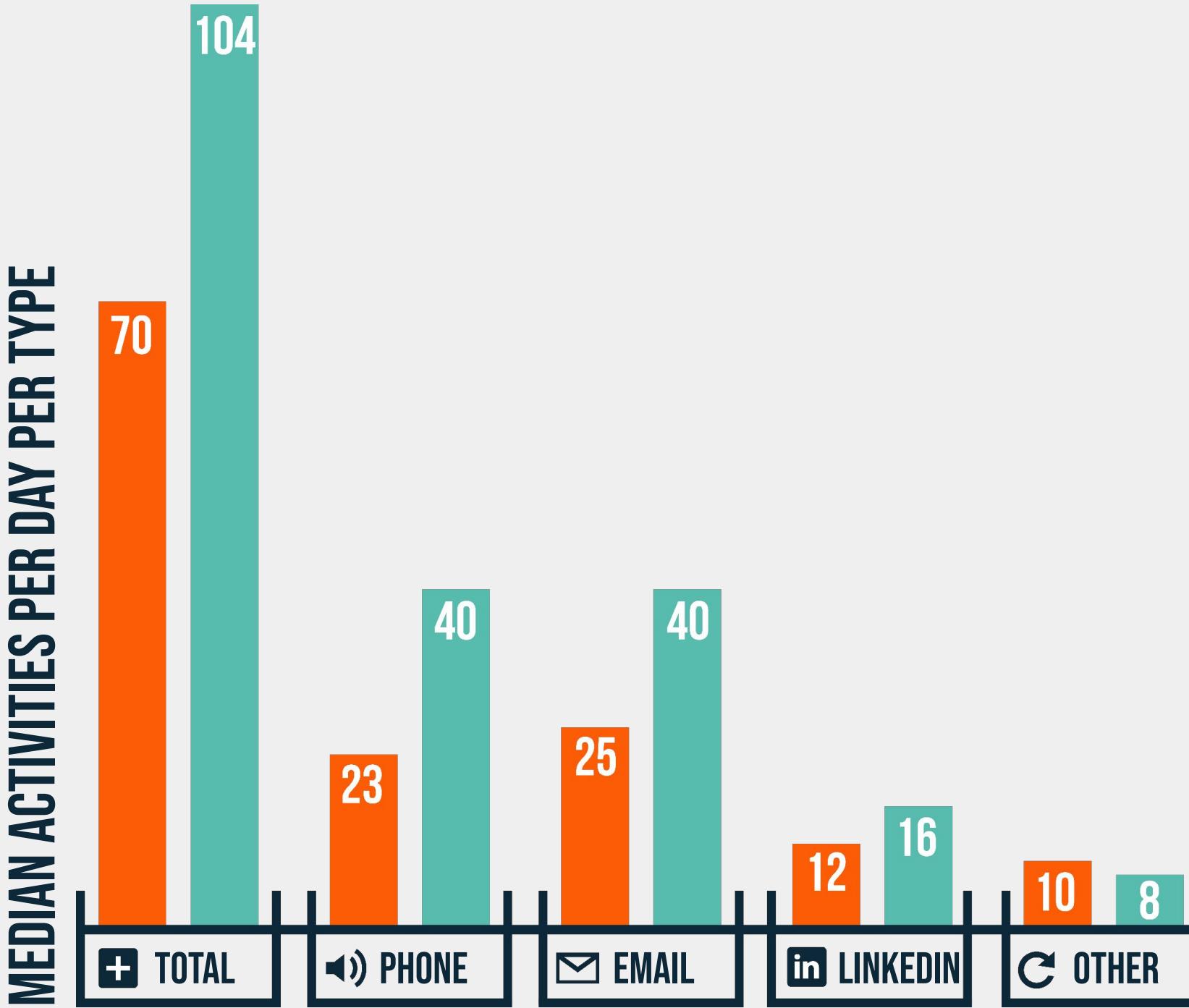
MEDIAN ACTIVITIES PER DAY PER TYPE



CHAT BOX

Which colour is
the AE's role?

THE AE ROLE



FEWER CALLS



FEWER ACCOUNTS

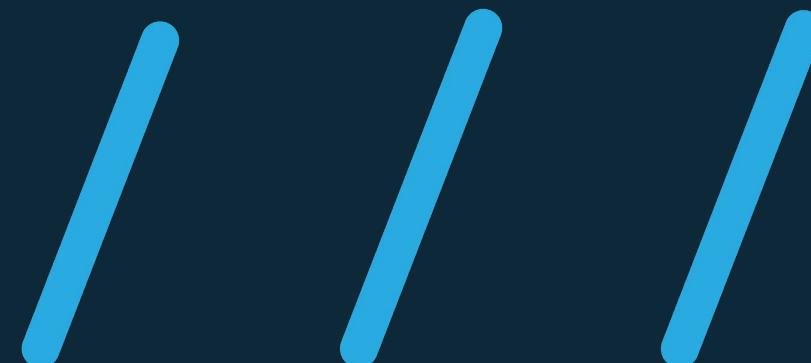


MORE TOUCH POINTS



LESS INSTANT GRATIFICATION

MENTAL TOUGHNESS AND RESILIENCE



**SDR: THERE'S SOME GRATIFICATION
EVERY SINGLE DAY**

**AE: HIGHS ARE DEFINITELY HIGHER,
BUT IN TURN, THE LOWS ARE LOWER**



CHAT BOX

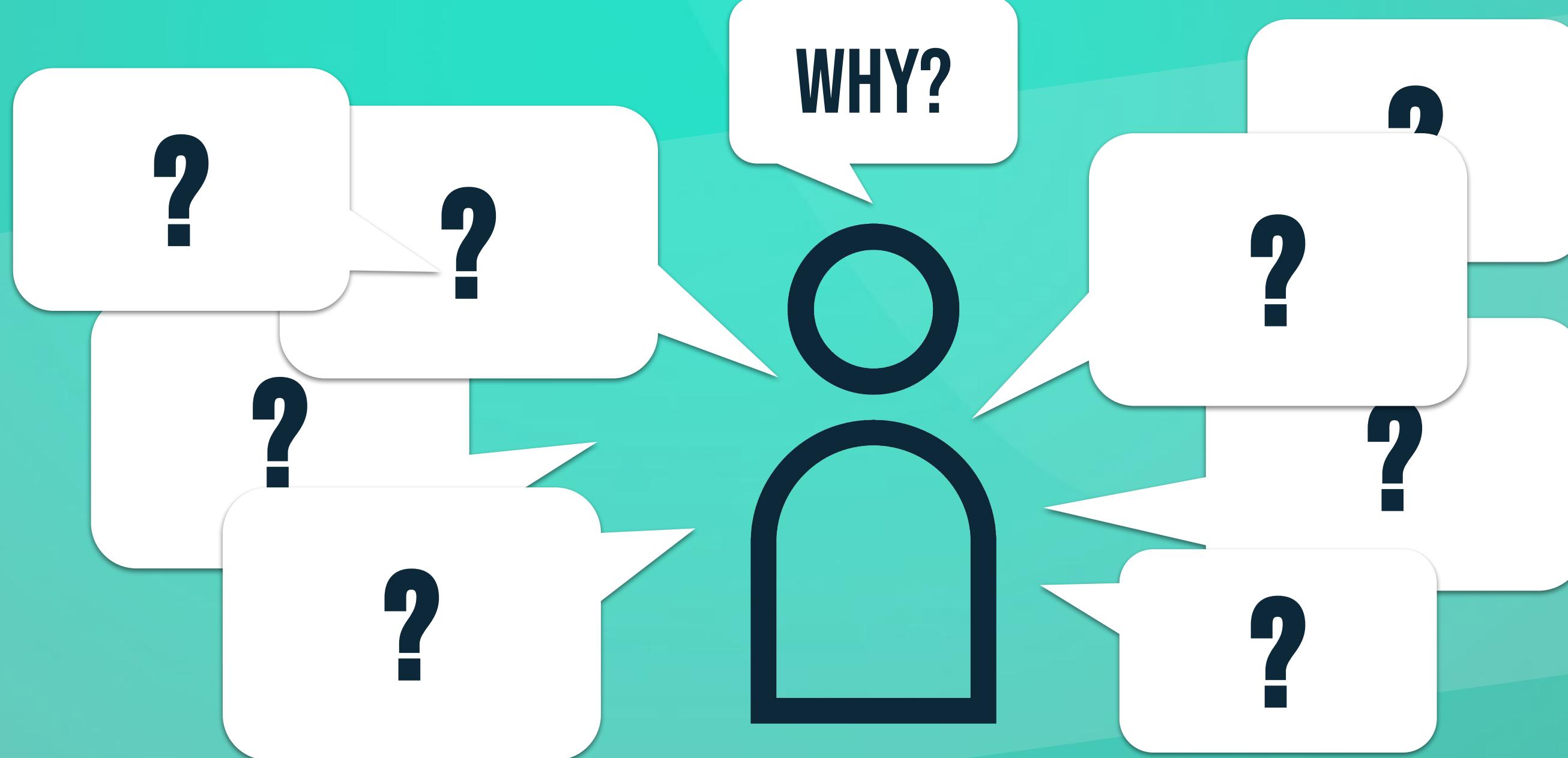
Were any of your predictions correct?



LEARNING OUTCOME 2

Develop questioning
skills in preparation
for discovery

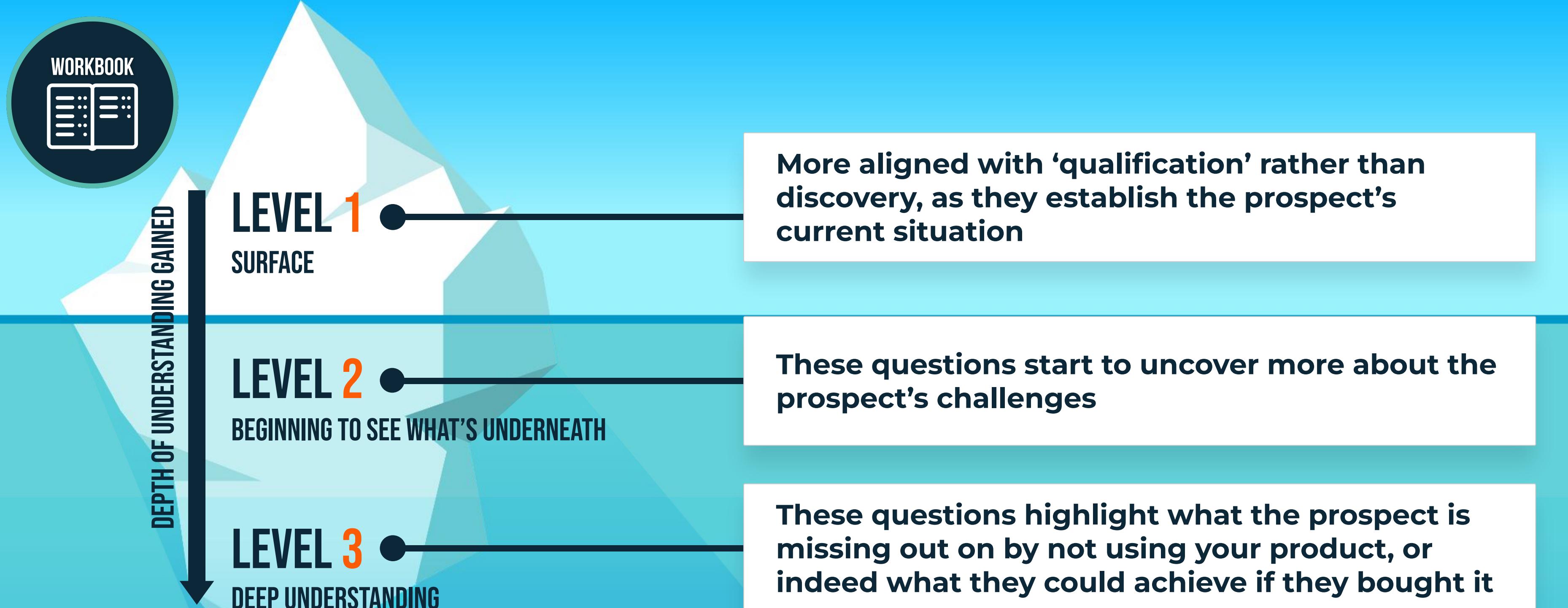
CURIOSITY



CHILDREN ASK ON AVERAGE

40,000 QUESTIONS BEFORE THEY ARE 5 YEARS OLD

THE THREE LEVELS OF QUESTIONS



QUESTIONING SKILLS



LEVEL 1

SURFACE

LEVEL 2

BEGINNING TO SEE WHAT'S UNDERNEATH

LEVEL 3

DEEP UNDERSTANDING



“What are you finding challenging in your role right now?”

“It’s frustrating that conversion rates aren’t where we need them to be.”

“Thanks for sharing that, when did you first notice conversion rates were causing you to feel frustrated?”

QUESTIONING SKILLS



LEVEL 1

SURFACE

LEVEL 2

BEGINNING TO SEE WHAT'S UNDERNEATH

LEVEL 3

DEEP UNDERSTANDING



“How long has X been an issue?”

“What have you done already to try and solve it?”

“Is it something you'd want to solve? Why now?”

“What would happen if you solved it? What is the cost to the business of not solving it?”

DISCOVERY CALL ROLE PLAY



START: CALL OPENER



AE

1.

We've not actually spoken before. Have you got 35 seconds so I can tell you why I've chosen to call you today?

2.

Hey *[Prospect First Name]*, it's Rachel from *[Company]*. Heard our name tossed around?



PROSPECT

I'm glad you called! I've
been looking at you
guys. It seems really
interesting.
Can I book a demo?





AE

1.

**Awesome I'm glad I called.
How is your calendar
looking tomorrow or the
next day?**

2.

**Awesome, glad I called. So
we can make the most of
your time, could you share
a bit more about your
interest in our solution?**



PROSPECT

**We had an incident recently
with a new product we
released. It is making us
rethink our release process.
We'd like to discuss best
practices with your team.**





Dead end!

They go ahead and book the discovery call but don't show up because their pain hasn't been discovered and they don't believe you can help them.





AE

1.

I understand, we hear that from clients a lot. Could you tell me a bit more about the incident and what the impact was?

2.

I can see why you got in touch this is exactly what we do and we help similar companies solve you've come to the right place.



PROSPECT

**It was a big deal for us.
The application was down
for six hours... we lost
significant revenue during
that time and our
customer support team
was inundated.**





Dead end!

As you do not have a good enough understanding of the pain points, the deal ends in no decision. You spend 90 minutes demoing to them and never hear from them again despite following up.





AE

1.

It sounds like this is a real problem for the business. From your perspective what happens to you personally if you don't manage to solve this?

2.

I think we better book you in for a demo so I can share how we solve this.



PROSPECT

**Well... if I don't solve this, my
future at the company is at risk.
We are getting immense
pressure from our shareholders.
My CTO has tasked me with
seeing this through.**





Dead end!

You demo the solution and they agree they need to look at this but they end up going with a competitor who's cheaper because they didn't see you as a trusted advisor.





You win!

You now have 2 pain points and have given yourself the best chance of a close-win outcome!



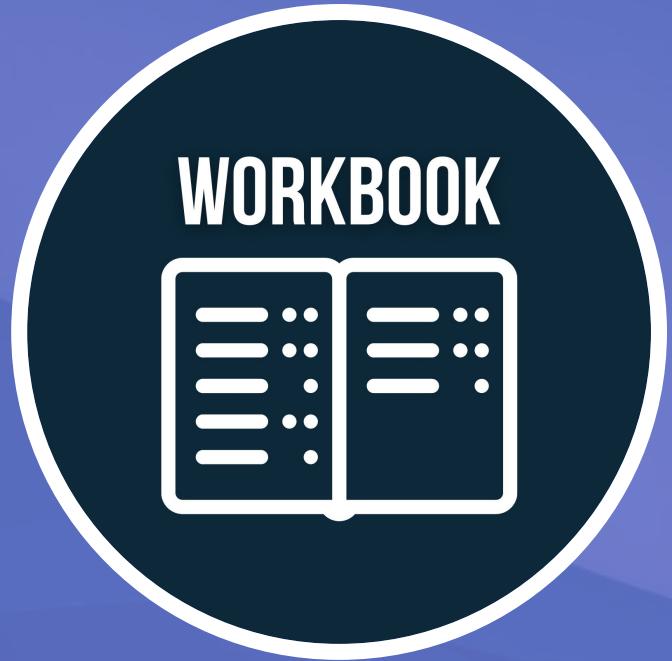


LEARNING OUTCOME 3

Become familiar with the
daily routine of an AE

PLANNING YOUR DAY





TASK 2

Become familiar with the daily routine of an AE



Mark where you think you are currently in terms of your day to day organization



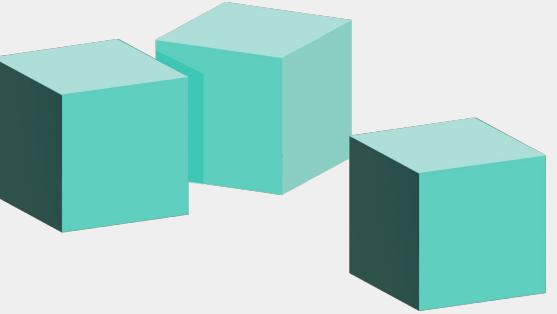
If you have any top organizational tips, pop them in the chat!



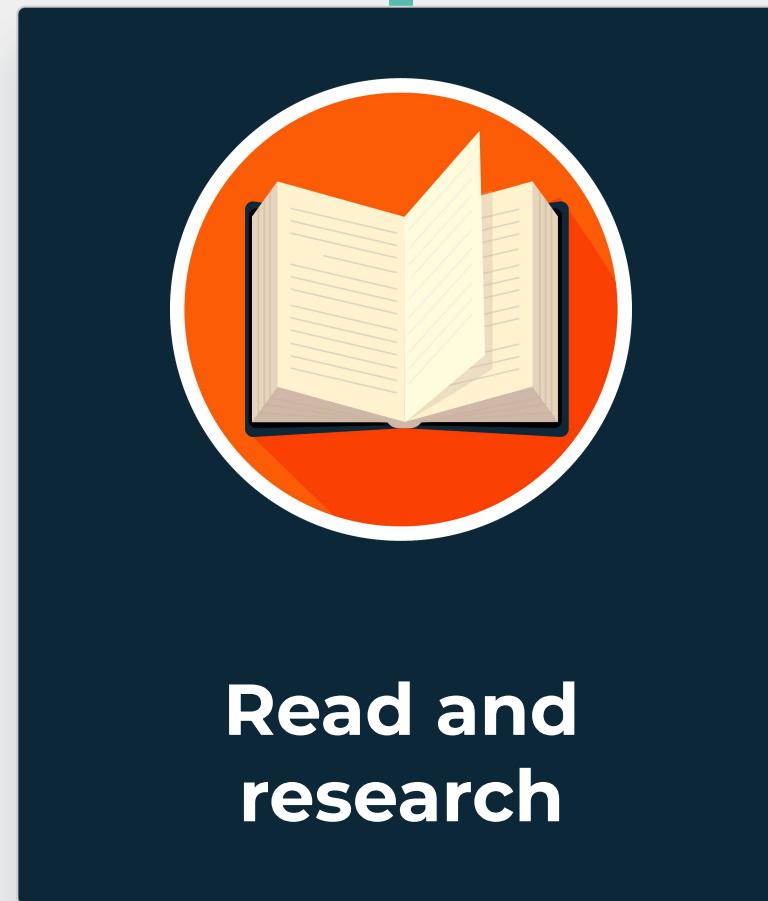
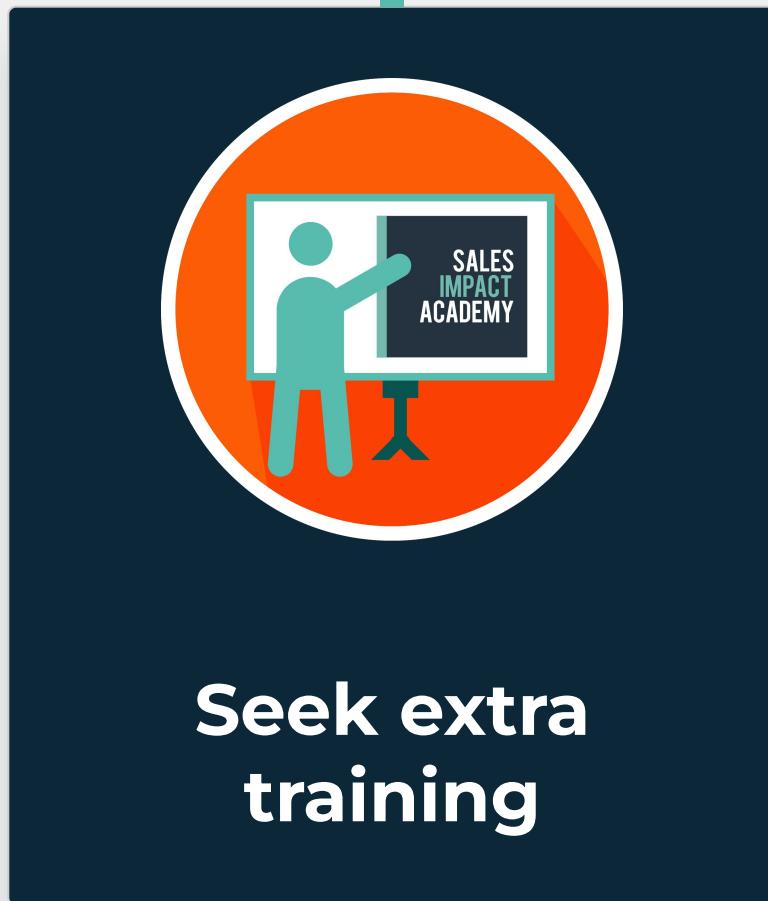
LEARNING OUTCOME 4

Create a plan for the steps you can take now to get closer to your goal

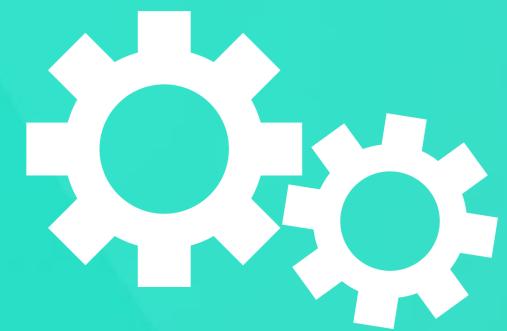
POSITIONING YOURSELF TO BE THE OBVIOUS CHOICE



MASTER THE BASICS

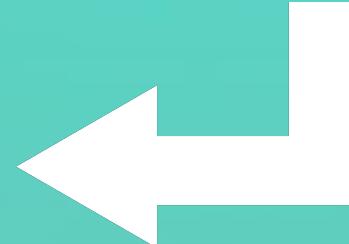


CONSTRUCT A SOLID PLAN



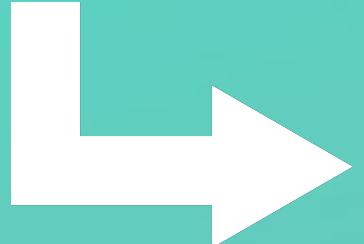
IS THERE A
PROCESS IN PLACE?

YES



Do you know where to find it?
Do you know who to ask?

NO



What opportunities do you have
to discuss your progression with
your manager?

MENTORS VS SPONSORS



MENTOR

A mentor will teach you how to improve and show you the way forward



SPONSOR

A sponsor will advocate for you when you're not in the room

FINDING A MENTOR OR SPONSOR

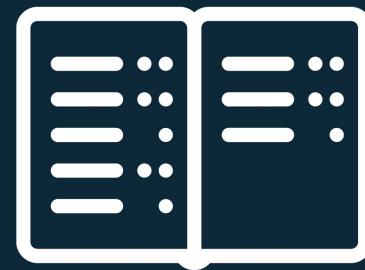


KEY QUESTIONS:

- ? What does a good mentor or sponsor look like?
- ? Where could you find them?
- ? How should you approach a mentor or sponsor?

TOP TIPS:

- Find people who have been there and done it
- Connect with managers who have a history of helping SDRs get promoted
- Become the leader

WORKBOOK

TASK 3

Create a plan for the steps you can take now to get closer to your goal



1 min

Write down your plans for discussing your progression with your manager and the steps you will take to look for a mentor



LEARNING OUTCOMES

IN TODAY'S CLASS YOU HAVE LEARNED TO...

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GIVE IT A GO

-  Get curious - try to annoy your family and friends by asking many, many questions
-  An extra step of curiosity in preparation for next class - try to find out more about your org's sales process, including close rate.



Q&A