Using Demo Gurus When Your AEs Are Overwhelmed

In a perfect world, every sales force would be overwhelmed with appointments.While it doesn't happen often, companies that are scaling can easily find themselves in a position where they have too many appointments for the number of sales people. In this situation, the rule of thumb is don't put an artificial constraint and let the AEs cherry pick the best leads with the understanding that not every prospect is going to be worked correctly.Normally, this situation clears once new AEs are onboarded and ramped. However, at times, this is not a realistic solution and throwing away opportunities can become very, very expensive over time.

A more long term approach is to further specialize the AE job description.Specifically, consider breaking the first appointment which is normally a discovery call, off and giving the responsibility to perform this to a Jr. AE. The Jr. AE would qualify the appointment, perform the demo and then schedule the next meeting. This person could also have the responsibility to send a follow-up note and any other material that might be helpful.

There are a number of benefits of using this approach:

The Jr. AE is weeding out companies that are not immediately interested in the solution.

The Sr. AE is only spending time with prospects that have been qualified and are interested in moving forward which will significantly increase the close rate.

Over time, due to the number of repetitions, the Jr. AE will become very proficient at doing the first appointment so the quality should improve.

It's a great way to promote an SDR into a sales role without giving them the responsibility of actually closing deals.

There are some downsides that should be considered:

It can be argued that the first appointment is the most important and an experienced AE perform this meeting is critical.

Prospects may be uncomfortable with another professional becoming involved with the process. It is critical to ensure that the Jr. AE hands off the prospect properly to the Sr. AE so information is not lost. While the loss of consistency is an issue, having the same sales engineer on both calls can go a long way to making a smooth transition.

If the Demo Guru or Jr. AE stops functioning an incredible number of first appointments can be burned. As such, it is very important to make sure that they continue to perform optimally.

It should be noted that most CRM systems will not support this level of specialization out of the box and it will take custom programming to implement this type of system.