THE FIELD MANUAL SERIES

The SDR to AE Playbook

Build the skills. Show the evidence. Make the move deliberately.

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Readiness portfolio / Promotion scripts / First 90 days

RESEARCH EDITION / 2026

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Promotion is a decision you can prepare for

Moving from SDR to account executive changes the work you are responsible for. You need to show that you can help a buyer evaluate a decision, manage an opportunity over time and coordinate the people involved. Strong prospecting remains useful; it is not the entire AE job.

This playbook helps SDRs and BDRs prepare for an internal move or an external AE interview. It also covers the first 90 days after a move. The goal is a credible evidence portfolio and a clear development agreement, not a promise of promotion by a particular month.

Three separate questions

- Performance: are you meeting the expectations of your current role?
- Readiness: can you demonstrate the capabilities required in the target role?
- Opportunity: is an appropriate position available, and how is it filled?

You can be strong in one area and constrained in another. Understanding which question is unresolved makes your next action more useful.

How to work through the book

Start with your employer's actual AE role description. Complete the skills map, agree on a development project, and build a small portfolio of reviewed work. Use the promotion conversation and interview sections when the evidence is ready. Adapt the ramp plan once you know the new role's expectations.

> All people, companies, targets and calculations in the cases are fictional. The schedules, scripts and rubrics are original working tools. They do not establish a universal promotion standard or guarantee a hiring outcome.

Research reviewed September 2026. Company-specific sources illustrate role and process distinctions; they are not rules for every employer.

01 / DEFINE THE DESTINATION

Choose the AE role you are actually preparing for

An AE title can describe very different work. A rep handling short inbound evaluations needs a different starting portfolio from someone managing complex outbound enterprise opportunities. Choose a target with enough detail to guide practice.

Salesforce's role overview describes BDR work around prospecting and qualification, while AEs lead sales conversations and demonstrations and work toward closing. Treat that as a broad role distinction, then inspect the actual job. Salesforce Trailhead: sales roles

Dimension	What to establish
Customer segment	Which buyers and account sizes?
Pipeline source	Inbound, self-sourced, SDR-supported or mixed?
Sales motion	New business, expansion or renewal responsibility?
Evaluation complexity	Typical stakeholders and technical work?
Ownership	Which stages and tasks belong to the AE?
Support	Available technical, operational and customer resources?

A useful target statement

"I am preparing for a commercial new-business AE role selling our current product, with SDR-supported pipeline and responsibility from discovery through handoff."

That statement is more actionable than "I want to close." It tells you which conversations to observe, which skills to practice and which hiring manager should evaluate your work.

Check the fit

Ask an AE what the difficult parts of the job are, including the work between calls. If you dislike maintaining records, coordinating follow-ups or navigating uncertainty, investigate that before treating the title as the obvious next step.

01 / DEFINE THE DESTINATION

Read the promotion process before building a campaign

Ask how the organization makes promotion decisions. Identify eligibility requirements, application steps, decision-makers, assessment criteria and whether an approved opening is required.

GitLab's published career guidance provides a concrete example: progression can depend on performance, management endorsement, training and a formal application or interview, with business need also affecting availability. Its detailed requirements vary by transition. This is one employer's process, not a universal tenure rule. GitLab: sales development and role guidance.

Questions for your manager

"What written criteria apply to the AE role I am targeting?"

"Who decides whether I am ready, and what evidence do they use?"

"Is there an approved role, an expected opening, or only a possible future path?"

"What is the process for applying, and when should we review my progress?"

Separate eligibility from selection

Meeting a tenure or attainment requirement may make you eligible to apply. It does not necessarily mean you have been selected. Ask what happens after eligibility is established.

When no written process exists

Propose a short development agreement with the manager and relevant hiring lead. Record the skills to demonstrate and the review date. Be clear that the agreement is about evaluation unless an authorized person explicitly commits to something more.

> Replace "They said I am next" with a record of who said what, which role they meant and what still needs to happen.

02 / BUILD A CREDIBLE FOUNDATION

Establish the current-role baseline

Make your SDR performance understandable before asking a manager to assess your next-role readiness. Include the target, actual result, period and the rules used to count the result.

GitLab's public SDR role guidance includes accepted-opportunity attainment and pipeline measures among its indicators. That illustrates why activity alone may not describe the contribution a company values. Use your own employer's definitions. GitLab: performance indicators

Fictional quarterly record

Measure	Target	Actual	Interpretation
Accepted opportunities	24	27	112.5% of this target
Meetings held	Not shown	36	Context; not the quota basis
Meetings booked	Not shown	45	Context for attendance
Held-to-accepted	Not a target	27 / 36 = 75%	Defined conversion for this period

This example does not imply that 75% is a benchmark or that all accepted opportunities will become revenue. It also does not establish an individual's contribution to a later closed deal.

Add the context that matters

Note ramp status, territory changes, leave, changed definitions and team contributions where relevant. Explain a miss with facts and corrective action, not excuses or omitted periods.

> Strong performance evidence is reproducible. Another person should be able to understand the numerator, denominator and time period without asking you to reinterpret the chart.

Keep customer and compensation records in approved systems. Use anonymized summaries when preparing a personal portfolio.

02 / BUILD A CREDIBLE FOUNDATION

Build a skills map around observable work

Translate the target role into things a reviewer can observe. "Commercial mindset" is too vague unless you agree on what it looks like in a real task.

Capability	Possible evidence	Reviewer
Discovery	Simulated or approved live-call segment	AE manager
Demonstration	Buyer-specific workflow presentation	AE or solutions lead
Opportunity judgment	Written deal review with unknowns	AE manager
Communication	Buyer recap and next-step plan	Assigned AE
Commercial reasoning	Scope and price scenario	Authorized manager
Execution	Accurate CRM example and follow-through	Manager or operations

These are original suggestions. Agree on acceptable evidence and recording or sharing permissions first.

Use four practical status labels

Not attempted; practiced with feedback; demonstrated under supervision; demonstrated independently within authorized scope. These describe observed work, not probabilities of success.

Identify the highest-leverage gap

If you can present well but cannot distinguish buyer facts from assumptions, another presentation may add little. Choose the gap that most limits confidence in your ability to handle the target role.

Finish the map with a decision

For each priority gap, assign one task, one reviewer and a review date. A large list of courses without a plan for demonstrating the skill is a learning backlog, not a readiness argument.

> Ask: "What would you need to see me do to change this status from practiced to demonstrated?"

02 / BUILD A CREDIBLE FOUNDATION

Open the development conversation

Make the request specific enough that your manager can respond constructively. Explain the role you are targeting, acknowledge current responsibilities and propose a bounded way to build evidence.

> "I want to prepare for a commercial AE role. I have pulled together my current performance and a first skills map. I would like your feedback on the gaps and on one development project I can complete without neglecting my SDR commitments. Could we agree on the evidence to produce and a date to review it?"

Bring three items

Your current performance summary, the target role description and a proposed development task. Keep the first meeting focused on alignment rather than presenting a large portfolio nobody asked you to build.

Ask for a clear response

Does the manager support the target direction? Which skills need work? Who else should assess readiness? Is there a realistic opportunity in the organization, or is the timing unknown?

Capture the agreement

Send a brief recap: "We agreed that I will practice the discovery summary and produce an opportunity review for [scenario]. [Reviewer] will assess it against [criteria] by [date]. My SDR priorities remain [agreed responsibilities]."

If the manager disagrees with the target, ask what drives the concern. It may be a skills gap, role fit, staffing need or a lack of available positions. Those require different responses.

> The first conversation should produce a development decision, not force an immediate promotion promise.

03 / CREATE RELEVANT EXPERIENCE

Protect your core work while building new skills

Development work is more credible when it fits an agreed workload. Quietly abandoning SDR responsibilities to shadow AEs can damage the performance record you need for the move.

Propose a small weekly allocation

For example, request one approved observation, one practice block and one short feedback session. The exact time depends on workload and manager agreement. Do not assume the schedule below is a universal standard.

Activity	Fictional time budget	Output
Observe one selected call	30 minutes	Notes on one skill
Practice the same skill	30 minutes	Revised work sample
Review with coach	15 minutes	One next adjustment
Total	75 minutes	A completed learning loop

Define the tradeoff openly

If a development assignment becomes larger, ask which work should move. Do not hide the cost or assume you should perform two full jobs indefinitely to prove commitment.

Watch the leading signals

Are current-role follow-ups slipping? Are you attending calls without learning a specific skill? Are coaches waiting on work you promised? Adjust the plan before missed commitments become a pattern.

Keep a short progress log

Record the task, feedback, revision and next application. Time spent is context; improved work is the evidence.

> A useful week ends with one demonstrated improvement. Several hours of passive observation can leave you with less evidence than one focused rehearsal and review.

03 / CREATE RELEVANT EXPERIENCE

Shadow with a question and a deliverable

Before observing a call, ask the AE what decision the meeting is intended to advance and which behavior you should study. Get any required approval for attendance, notes or recordings.

Observation brief

"I am working on how to summarize discovery and agree on next steps. Could I observe the final part of your next appropriate call and send you a short analysis afterward? I will follow your guidance on participation and handling the notes."

During the call

Track the buyer's problem, the evidence the AE tests and how the next question relates to the answer. Note what the AE leaves unresolved. Do not interrupt to demonstrate your knowledge unless invited to contribute.

Debrief with the AE

- What were you trying to learn at that moment?
- Which answer changed your plan?
- What risk remains after this conversation?
- Why was that next step useful for the buyer?
- What would you have done if the answer had been different?

Produce something reviewable

Write a short buyer recap or an evidence map, then compare it with the AE's interpretation. Differences are valuable. You may have heard an expression of interest where the AE heard an untested assumption.

> Shadowing becomes development when you move from watching a skilled person to explaining and practicing the decisions behind their behavior.

Keep the learning artifact internal unless you have explicit permission to share it elsewhere. Customer confidentiality continues to apply when the work is part of a promotion portfolio.

03 / CREATE RELEVANT EXPERIENCE

Move from observing to assisting

Ask for a narrow task with clear boundaries before asking to run an entire opportunity. The task should help the AE and expose you to the target skill without creating confusion for the buyer.

Assistance task	Boundary to agree	Evidence of useful work
Prepare account context	Approved sources and scope	Relevant, accurate brief
Draft buyer recap	AE reviews before sending	Facts, unknowns and actions separated
Lead one discovery segment	AE retains meeting ownership	Buyer problem clarified
Build a demo scenario	Approved capabilities only	Scenario matches buyer criteria
Maintain agreed action log	Authorized system access	Owners and statuses accurate

Ask for the standard

"What would a good version look like, what should I avoid, and when would you like to review it?"

Do not borrow authority

Assisting does not authorize you to promise pricing, delivery dates, product capabilities or contract changes. Escalate those questions to the responsible person. Do not contact the buyer independently unless the owner has agreed.

Close the loop

After the task, ask what was useful and what needed correction. Revise the artifact, then document your actual contribution. "Drafted the recap and incorporated AE feedback" is different from "managed the deal."

> A bounded task gives your reviewer evidence of judgment as well as skill: you know where your responsibility begins and ends.

Increase ownership when the reviewer has seen reliable execution, not simply because you attended several calls.

03 / CREATE RELEVANT EXPERIENCE

Demonstrate discovery without memorizing a speech

For a readiness assessment, ask the reviewer to give you a buyer scenario with information you do not know in advance. Your task is to investigate, not recite a predetermined sequence.

Suggested practice brief

A fictional operations manager says handoffs are becoming unreliable. You have 15 minutes to understand a recent example, the consequence and the next useful evaluation step. The partner chooses whether the underlying issue is missing data, unclear ownership or scheduling.

Evidence the reviewer can inspect

- You agreed on a useful purpose for the conversation.
- Your follow-ups responded to the buyer's actual answers.
- You distinguished a general complaint from a concrete problem.
- You labeled estimates and unresolved assumptions.
- Your summary gave the buyer a chance to correct you.
- Your proposed next step addressed a real unknown.

A coachable mistake

If you pitch too early, recover: "I jumped ahead. Before suggesting a solution, could we clarify what happened in the last case?" Then change your behavior. An explanation of why you made the mistake is less useful than a better next question.

Capture the work honestly

Label the artifact as a simulation, list the scenario and note the feedback. Do not present a rehearsal as a customer engagement. If using an approved real-call segment, identify the scope you personally led.

> Your readiness evidence is the quality of your reasoning under changing information, not how confidently you deliver the first prepared minute.

03 / CREATE RELEVANT EXPERIENCE

Build a demonstration around a buyer decision

A product tour shows what exists. A buyer-specific demonstration helps someone evaluate whether a capability addresses their requirement. Practice the latter.

HubSpot's inbound-sales curriculum includes understanding buyer context and delivering personalized presentations. Use that as a learning resource, then demonstrate the skill with your own approved scenario. A course completion alone is not evidence of independent selling ability. HubSpot Academy: inbound sales

A compact demo assignment

Select one buyer problem, one relevant workflow and two evaluation questions. Ask a reviewer to interrupt with a realistic concern. Finish by checking what the buyer learned and what still needs verification.

Element	Fictional example
Buyer problem	Unclear owner when a handoff is incomplete
Workflow	Route an exception to the responsible person
Evaluation question	Can the user see the next action?
Limitation to verify	Integration with the buyer's current system

Stay inside the evidence

Use approved product behavior and data. If the scenario requires something the product cannot do, name the gap. If you need a specialist to answer a technical question, explain that next step rather than improvising a promise.

Review the recording or notes

Did each screen relate to the buyer's question? Did you pause for evaluation? Could the reviewer tell the difference between demonstrated functionality and an assumption?

> The portfolio artifact should include the scenario brief and the unresolved questions, not only a polished presentation.

03 / CREATE RELEVANT EXPERIENCE

Practice opportunity judgment

An AE needs to decide what work an opportunity deserves and why. Build a short review that explains the buyer's situation, the evidence supporting progress and the risks still open.

Original opportunity-review format

Area	What to state
Problem	Specific buyer situation and supporting example
Importance	Buyer-described impact and priority
Fit	Relevant capability and known limitations
People	Participants, authority and missing perspectives
Process	Next decision and dependencies
Risk	Most important assumption that could fail
Action	Work that could resolve the uncertainty

Fictional judgment call

The contact likes the demonstration, but no operational owner has validated the workflow and no investment process is known. A weak review calls the deal "hot." A stronger review recommends a working session with the appropriate owner before spending time on a detailed proposal.

Ask for a challenge

Have the manager change one fact: the contact leaves, the budget owner rejects the timing, or a required capability is unavailable. Explain how that changes your recommendation.

Keep forecast labels grounded

Use your employer's definitions for stages and forecast categories. Do not invent a probability because a deal feels promising. A simulation can test your judgment without pretending you own a live forecast.

> A good review makes it easy for the manager to disagree with a specific assumption. That is more useful than a confident summary with no inspectable reasoning.

03 / CREATE RELEVANT EXPERIENCE

Learn commercial reasoning within your authority

You do not need to grant real discounts to practice a commercial conversation. Use an approved fictional price and scope scenario. Your task is to understand the buyer's concern and compare authorized options.

Fictional price exercise

A subscription is $24,000 annually for a defined scope. A buyer asks for 20% off. That would reduce annual price by $4,800 to $19,200. The arithmetic is straightforward; the reason for the request is still unknown.

Ask whether the concern is available budget, perceived value, payment timing or unused scope. Then identify which options your company would permit. A smaller scope, different start date or payment arrangement may address a different problem from a discount.

What the reviewer should observe

- You clarify the concern before offering a concession.
- You know which terms require approval.
- You compare the whole proposed package, not just one number.
- You avoid inventing deadlines or competitor claims.
- You record the proposed terms accurately.

A safe practice response

"Before I suggest an option, could we clarify whether the issue is the annual amount or paying it upfront? I can then check which approved alternatives address that constraint."

Keep the contribution honest

If you helped prepare options for an AE, say that. Do not claim to have negotiated a contract you did not own or have authority to change.

> Commercial readiness includes knowing when to ask for approval. Confidence without boundaries creates risk for the buyer and your team.

03 / CREATE RELEVANT EXPERIENCE

Make follow-through visible

An impressive call can be undermined by an inaccurate recap or a missed commitment. Treat execution as a skill you can demonstrate deliberately.

A small execution sample

Use an approved scenario to create a meeting recap, CRM note and action log. They should tell the same story. The recap is buyer-facing; the internal note can include qualification uncertainty and your recommendation.

Item	Quality check
Buyer recap	Accurate facts, assumptions and agreed actions
CRM note	Clear evidence, source, date and unresolved risk
Action log	Owner, due date, status and completion evidence
Follow-up	Sent through the agreed channel at the agreed time

Spot a contradiction

If the buyer said they would check availability, the action log should not say "meeting confirmed." If the analyst has not validated the estimate, the CRM should not call the value calculation verified.

Show a revision

Include one example where feedback improved your record. Explain what was wrong and how you prevented the same mistake in the next task. That shows learning more clearly than a folder of flawless-looking documents with no context.

Protect confidentiality

Keep real customer work in approved systems. For an external interview, create an analogous fictional sample rather than exporting internal records. Describe the skill and your contribution without exposing information you are not authorized to share.

> Reliable follow-through is observable. A manager should be able to see what you promised, what you delivered and how you handled a change.

04 / PRESENT THE EVIDENCE

Assemble a small portfolio that answers the role question

Build the portfolio around the target role's criteria. A reviewer should not have to infer why an artifact matters or search through dozens of files.

Suggested portfolio index

Artifact	Question it helps answer
Performance brief	Is the current-role contribution clear?
Skills map	Which AE capabilities have been assessed?
Discovery sample	Can the candidate investigate and summarize?
Demo scenario	Can they connect capability to buyer criteria?
Opportunity review	Can they reason about risk and next actions?
Execution sample	Can they maintain accurate commitments and records?

Add a short note to each artifact

State the context, your exact contribution, whether it was simulated or live, the reviewer and date, the feedback, and what changed afterward. Link to approved internal records where appropriate.

Show the limits

If you have not owned a contract negotiation or a complete sales cycle, say so. Explain the supervised work and practice you have done and the support you would need initially. Inflating experience can create expectations you cannot meet.

Keep it reviewable

Use a one-page index and concise artifacts. The purpose is to make evidence accessible, not to impress through volume. Remove duplicated examples that show the same skill without adding new information.

> Portfolio test: for every file, finish the sentence "This demonstrates ___ because ___." If you cannot, improve the annotation or leave the file out.

04 / PRESENT THE EVIDENCE

Build relationships through useful work

Internal visibility can help the right people understand your work, but visibility without substance is fragile. Build relationships by being reliable, asking focused questions and making a useful contribution.

Three different roles

A coach helps you improve a skill. A manager evaluates your current work and development. A sponsor may advocate for you when a role is considered. One person can play several roles, but do not assume that friendly encouragement means active sponsorship.

A useful request

"I am preparing for the commercial AE role and working on opportunity judgment. Could you review this one-page fictional case against the criteria your team uses? I would value the two changes that would make the analysis stronger."

This is easier to evaluate than a broad request to "mentor me" with no context or boundary.

Earn a specific endorsement

After working together, ask whether the reviewer would be comfortable describing the skill they observed. Do not script exaggerated praise or pressure someone to endorse work they did not see.

Keep your manager informed

Coordinate development relationships rather than making surprise requests that appear to bypass the process. If you encounter conflicting expectations, bring the criteria together and ask which standard governs the role.

> A strong internal reputation is an accumulation of accurate promises and useful delivery. Treat a relationship as a working partnership, not a shortcut around readiness.

04 / PRESENT THE EVIDENCE

Run the promotion review as a business conversation

When you have the agreed evidence, request a review tied to the actual process. State the role, show the work and ask for a clear assessment of readiness and opportunity.

> "I would like to review my readiness for the commercial AE role. We agreed on three gaps: discovery, opportunity judgment and buyer follow-through. Here is the assessed work for each, including the feedback and revisions. I would like your view on whether I meet the current criteria and what the next step in the application process should be."

A focused meeting structure

Begin with current-role performance. Show the two or three artifacts that address the most important gaps. Discuss any untested responsibilities. Then ask about the role, decision process and next date.

Ask for a specific outcome

Ready to apply; more evidence needed; a different target role recommended; or no available role despite readiness. These are different decisions. Avoid leaving with only "keep doing what you are doing."

Record the result

Send a factual recap of the assessment, remaining gap, owner and review date. Do not write that a promotion was promised if the discussion only established eligibility or support for applying.

> The argument is not "I have waited long enough." It is "Here is the evidence against the role's criteria, and here is the decision I am asking you to make."

Tenure may matter under the policy. It should be represented accurately alongside performance, readiness and available opportunity.