AE & SDR Relationship: Operating Procedures

LEAD QUALIFICATION

I. Sales Development Responsibility: SDRs qualify prospects based on the first two sets of the qualifying decision model. If the prospect is not viable, then the Sales Development Rep will not receive credit for the demo.
   A. SDR aims to have a positive conversation with a decision-maker and discover as much of the following before passing along.
      1. Needs
      2. Timeline
      3. Budget
      4. Decision Makers
      5. Meeting Availability

II. Account Executive Responsibility: The Account Executive will assume that the opportunity qualifies. The Account Executive will dig further into the prospects' situation with specific questions to identify problems and gaps in their business strategies, and create a sense of mutual agreement and urgency. Once a plan is created, an application or POA is created and the lead is deemed "qualified."

LEAD PASSING

I. Sales Development Responsibility: Once the lead has been qualified the SDR will access the Opp and change the ownership to the account executive in a round robin fashion. If the Account Executive that is next in line is not available for the demo at the proposed time, the SDR may skip that particular Account Executive and move to the next one in order to get the demo in place. However, the SDR agrees to make the previous Account Executive their priority, and pass the lead to them when the next demo has been scheduled.
II. Account Executive Responsibility: The Account Executive understands that a "perfect" Round-Robin lead pass system is not always feasible because of conflicting times, calendars, and other priorities. The Account Executive will trust the Sales Development Team and Process in receiving a fair and equal amount of demos.

LEAD OWNERSHIP

I. Sales Development Responsibility: The SDR will assume full ownership and responsibility over the prospect until the prospect has completed the handoff with the Account Executive. In cases of Handoff Missed, Handoff Rescheduled, Handoff Cancelled, and No Shows, the SDR is required to reschedule the meeting back onto the Account Executive's calendar. The Sales Development Rep will not receive any credit until the handoff has been completed and accepted by the AE.

A. It is in the SDRs' best interest to send a reminder email the night before or morning of the meeting to ensure the best chance of the prospect showing up.

II. <u>Account Executive Responsibility:</u>

A. Post Meeting: The Account Executive will assume full ownership and responsibility over the prospect once the call has been completed. This includes Follow-Up calls, chasing docs, meeting with additional members from the team, and coordinating next steps.

B. Opp is Running Late: The Account Executive will have a "small window of ownership" if the prospect is running late. The Account Executive may send an email to the prospect 5-7 minutes after the proposed meeting time to confirm the meeting and send a reminder to the prospect. After 11-13 minutes, the Account Executive must chat, call, or email the SDR to notify them that the prospect was a No-Show

C. Relinquishing ownership: If the prospect becomes disengaged and "goes dark," it is the Account Executive's responsibility to either continue to re-engage, or pass it back to the SDR lead pool to prospect into with the understanding that the prospect will fall back into Round-Robin rotation.

D. Failure to Show Up - If the Account Executive, in a case of emergency, cannot run the call that has been scheduled, they must immediately notify the SDR and work with them to find a substitute Account Executive that can run the meeting. The Account Executive will also forfeit their call to the other Account Executive. It will not count against the Account Executive that takes the call, and Account Executive will not be backfilled for their forfeited call. If a Account Executive does not show up (or is late) for a call that is scheduled on their calendar, punitive measures may be taken.

CALENDAR

I. <u>Sales Development Responsibility:</u> The SDR should not schedule any meetings over the Account Executives' existing events. The SDR understands that if an open slot is available on the Account Executives' calendar, then it is safe to assume that the Account Executive is available at that time. If a Sales Development Rep schedules a meeting on top of an existing event on the Account Executives' calendar, it is the Sales Development Reps' responsibility to reschedule that meeting for the Account Executive.

II. <u>Account Executive Responsibility:</u> The Account Executive is responsible for keeping their calendar updated at all times. They must block off all "busy times" on their calendar, which includes holidays, vacations, lunches, doctors' appointments, phone calls, meetings, and other times at which they may not be available to run a demo. The calendar must be visible and clear in order for the SDR to schedule a demo. The Account Executive agrees to forfeit the demo if they fail to mark an existing event on a calendar, and a demo is scheduled over it. In essence, they will be skipped on the Doc.

MARKING DEMOS IN CRM AND SDR “CREDIT”

I. Sales Development Responsibility: Once the call has been scheduled, the SDR will create a specific Open Task for the Account Executive in Salesforce (i.e. SDR-Submit/SDR-Call Scheduled) for the Account Executive to complete after the call has been executed. The SDR understands that they are paid based on XXXX by the Account Executive team. The SDR will not actively close any Account Executive assigned tasks. If this occurs, it is considered fraud by the company (taking undue credit) and punitive steps may be taken.

II. Account Executive Responsibility: The Account Executive understands that the SDR is paid based on their number of calls on a monthly basis, and are reported on on a weekly basis. The Account Executive agrees to close the Open Task assigned from the SDR as early as possible, preferably right after the call has been completed, but at the latest End of Business that day.

TRUST AND RESPECT AMONGST THE TEAMS

I. Sales Development Responsibility: The SDR will assume that the Account Executive is operating under the best interest of the company, and will do their best to close the deal. The SDR understands that the Account Executive will, to their fullest potential, understand the situation, needs, and pains of the prospect, and will not “unqualify too early” to “give up too soon.”

II. Account Executive Responsibility: The Account Executive will assume that all leads passed over qualified to the best of the SDRs’ ability, and were not passed “unscreened.” The Account Executive will not treat the SDR as a “lesser” person or a personal assistant.