

AE (Account Executive) Onboarding Template

Week 1-2: Foundation & Product Mastery

Focus Area	Activities	Deliverables	Success Criteria
Company Knowledge	Culture training, sales process overview, market analysis	Market plan document	Understands market, competition, company positioning
Product Expertise	Hands-on exploration, use case training, technical deep-dive	Create 3 demo scenarios	Delivers confident 20-minute demo
Sales Methodology	Consultative selling training, discovery framework	Practice discovery calls	Uses structured questioning, identifies pain points
Competitive Intelligence	Competitor analysis, positioning training, objection responses	Complete battle cards	Handles competitive questions confidently

Week 3-4: Customer Interaction & Tools

Day	Morning (4 hours)	Afternoon (4 hours)	Evening Prep
Week 3	Shadow senior AE calls	Practice discovery questions	Review call recordings, plan next day
Week 4	Lead supervised discovery calls	CRM workflow training	Update opportunities, prepare follow-ups

Month 2: Pipeline Development

Week	Primary Focus	Activities	Success Metrics
5-6	Opportunity Creation	Independent prospecting, inbound lead follow-up	Generate 3 qualified opportunities
7-8	Discovery & Demo	Conduct needs analysis, deliver product demonstrations	Advance 2 opportunities to proposal stage

Month 3: Deal Management

Week	Focus	Activities	Goals
9-10	Proposal Development	Create custom proposals, pricing discussions	Submit 2 formal proposals
11-12	Negotiation & Closing	Handle objections, negotiate terms, close deals	Close first deal or advance to final approval
