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Seller Resources

HOW TO GET INTO B2B TECH SALES

A complete guide to understanding the industry, using your existing skills, choosing a path, finding opportunities, and starting a career in B2B technology sales.

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Introduction

If you're reading this, you've probably already noticed that "tech sales" comes up a lot when people talk about careers that pay well, don't require a specific degree, and are genuinely open to people switching in from something else. You've probably also noticed that most of what's written about it online is either a recruiting ad dressed up as advice or a get-rich-quick pitch that skips over what the job is actually like. This guide is neither of those things. It's a straightforward explanation of what B2B tech sales is, how the industry works, what the jobs actually involve day to day, and how someone with no sales background can realistically get in and build something out of it.

What B2B tech sales actually is

B2B stands for business-to-business. It means the customer isn't a person buying something for themselves; it's a company buying something to use in its own operations. B2B tech sales, then, is the work of selling technology products and services to other businesses rather than to individual consumers. The buyer might be a 12-person startup or a 40,000-person bank. The product might be a piece of software that costs \$500 a month or a piece of infrastructure that costs \$2 million a year. What ties it all together is that the person on the other end of the sale is buying on behalf of an organization, using the organization's money, and answering to other people inside that organization for the decision.

That last part is the whole ballgame, and it's worth sitting with for a second. When you buy a phone, you're the one who decides, you're the one who pays, and you're the one who lives with the outcome. When a business buys a piece of software, none of that is true in the same way. The person you're talking to might not be the person who pays. The person who pays might not be the person who uses it. The person who uses it might not be the person who has to approve it from a security standpoint. Selling into that kind of decision is a different skill than convincing one person to swipe a credit card, and it's the skill this guide is going to help you understand and build.

Why technology companies need salespeople at all

A reasonable question, especially if you've never worked in tech, is why software companies need sales teams in the first place. If the product is good, shouldn't it just sell itself?

Sometimes it does, for cheap, simple, self-explanatory tools that a single person can sign up for with a credit card in five minutes. But most B2B technology isn't that. It solves a problem that a business doesn't always know it has, in a way that isn't obvious from a website, at a price that requires someone with budget authority to say yes. Someone has to find the businesses that have the problem, explain how the product solves it in terms that make sense to that specific business, get the right people internally to agree it's worth doing, and guide the whole thing through however that company approves a purchase. That's a sales job. It's not an

add-on to the business. For most B2B technology companies, sales is one of the two or three functions the entire company is built around, alongside building the product and supporting the customers who already bought it.

Consumer sales versus business sales

If you've worked retail, hospitality, or any job where you helped individual customers, you already have some sales instinct. But selling to a business is a different animal from selling to a consumer, and it's worth being clear about the differences up front so you're not caught off guard.

A consumer sale usually involves one decision-maker, a relatively short window between interest and purchase, and a price that the buyer can justify on gut feeling or personal preference. A business sale usually involves several people, sometimes many, each of whom cares about different things. A finance person cares about cost and contract terms. A security person cares about whether the product is safe to connect to company systems. The day-to-day user cares about whether it actually makes their job easier. A senior executive cares about whether it moves a number they're accountable for. You're not making one argument to one person. You're making several different, connected arguments to several different people, and the sale doesn't close until enough of them agree.

Business purchases also tend to take longer, sometimes much longer, and they usually involve a written contract, some kind of internal approval process, and often a legal and procurement review before money changes hands. None of this makes B2B sales harder in some abstract sense than consumer sales. It just makes it a different kind of work, built more around research, patience, and managing a process than around a single persuasive pitch.

Why this can be a strong career path

B2B tech sales gets recommended a lot, and it's worth being honest about why, without overselling it.

The income potential is real and it's uncapped in a way that's unusual outside of sales and a handful of other fields. Most sales roles pay a base salary plus commission, and the commission portion typically has no ceiling, meaning a strong year can pay meaningfully more than an average one. It's also one of the few professional career paths where you genuinely don't need a specific degree, a certification, or years of prior experience in the field to get your first job. Companies hiring entry-level sales development roles care much more about whether you can communicate clearly, handle rejection, and put in consistent effort than about your college major. And the skills you build, explaining value clearly, managing a process with multiple stakeholders, negotiating, understanding how businesses make decisions, transfer to a lot of other roles later, inside and outside of sales.

None of that means it's easy money or guaranteed success. The job involves a lot of rejection, real performance pressure tied to quota, and periods where the work feels repetitive before it

feels rewarding. This guide isn't going to promise you a six-figure income or a fast promotion, because nobody can promise you that. What it can do is give you an honest, detailed picture of the industry and a realistic plan for getting in and getting good.

You don't need a sales background, and there's more than one way in

A lot of people rule themselves out of tech sales because they've never had the word "sales" in a job title. That's a mistake. Some of the strongest people in this industry came from teaching, healthcare, retail, hospitality, the military, customer support, or a completely unrelated field, and Chapter 3 of this guide is dedicated entirely to showing you why that background is more useful than you think.

There's also more than one entry point. The most common one is a sales development role, which we'll explain in detail in Chapter 2, but it's not the only one. Someone with deep knowledge of healthcare operations might be a strong fit for a healthcare technology company's account executive team from day one. Someone with a technical background might be better suited to a sales engineering role. Someone who's spent years in marketing might slide naturally into selling marketing technology to other marketers. Part of the work of this guide is helping you figure out which door fits you best, rather than assuming there's only one way in.

Let's get into it.

Chapter 1: Understanding B2B Tech Sales

What "B2B" means, precisely

B2B, business-to-business, describes any transaction where both the seller and the buyer are organizations rather than individual consumers. It sits opposite B2C, business-to-consumer, where a company sells directly to individual people for personal use. There's also B2B2C, where a company sells to a business that then resells or provides the product to consumers, and a handful of other variations, but B2B is the one this guide focuses on because it's the dominant model in enterprise technology.

The distinction is worth understanding because it shapes almost everything about how the sale happens: who you're talking to, how long the process takes, how the product gets priced, and what "closing a deal" actually requires. Keep this definition in the back of your mind as we go, because a lot of later chapters will refer back to it.

What technology companies actually sell

"Technology" is a broad word, and if you're new to the industry it helps to have a mental map of what's actually being sold out there. Here are the major categories you'll run into, along with a plain description of what each one does.

Software as a Service, or SaaS. This is software that customers access over the internet, usually through a browser or an app, rather than software they install and run on their own computers. A company doesn't own the software; it pays to use it, typically on a monthly or annual basis. Most of the technology categories below are delivered as SaaS today.

Cloud infrastructure. This is the underlying computing power, storage, and networking that businesses rent instead of building themselves. Companies like Amazon Web Services, Microsoft Azure, and Google Cloud sell this. Instead of a business buying and maintaining its own servers, it rents computing capacity and pays based on usage.

Cybersecurity. These are products and services that protect a business's data, systems, and networks from threats: things like identity and access management, threat detection, endpoint protection, and compliance tools. This is one of the fastest-growing and most consistently well-funded categories in enterprise technology, because the cost of a security failure is severe and boards take it seriously.

Artificial intelligence and AI tooling. This covers a wide range, from AI models and platforms that businesses build on top of, to AI features embedded inside existing products, to standalone AI tools that automate a specific task like customer support, coding, or content generation. This category has grown extremely quickly and touches almost every other category on this list, since most software companies are now adding AI capabilities to their existing products.

Data and analytics. These are tools that help businesses collect, organize, and make sense of their data, from data warehouses and pipelines to business intelligence and reporting tools that turn raw numbers into decisions.

Communications technology. This includes business phone systems, video conferencing, messaging platforms, and customer communication tools that let a company talk to its employees, partners, and customers.

Financial technology, or FinTech. These are tools that help businesses manage money: payments processing, invoicing, expense management, payroll, banking infrastructure, and financial planning software.

Healthcare technology, or HealthTech, and medical technology, or MedTech. HealthTech usually refers to software used in healthcare operations, like electronic health records, patient scheduling, or care coordination tools. MedTech more often refers to devices and hardware used in clinical or diagnostic settings. Both sell into hospitals, clinics, insurers, and other healthcare organizations, and both have specific regulatory requirements that shape how the sale happens.

Marketing technology, or MarTech. Tools that help marketing teams do their jobs: email marketing platforms, customer data platforms, advertising and analytics tools, content and campaign management systems.

Education technology, or EdTech. Software sold to schools, universities, and corporate training departments: learning management systems, tutoring and assessment platforms, and administrative tools for education institutions.

Human resources technology, or HRTech. Tools that help HR teams manage hiring, payroll, benefits, performance reviews, and employee records.

There are more categories beyond this list, including sales technology, legal technology, property technology, developer tools, and ecommerce technology, all of which we'll cover in more depth in Chapter 4 when we talk about choosing an industry. For now, the point is simply this: "tech sales" isn't one thing. It's dozens of distinct industries that happen to share a delivery model.

Understanding SaaS, subscriptions, and recurring revenue

Because so much of B2B technology is sold as SaaS, it's worth understanding the business model in a bit more depth, because it directly affects how salespeople are measured and paid.

In a traditional software sale, a company might pay once for a license and own it. In a SaaS model, the customer pays on an ongoing basis, usually monthly or annually, for continued access. This is called recurring revenue, and it's the financial backbone of the modern software industry. A single sale isn't a one-time event; it's the start of an ongoing relationship that the company hopes to keep, and ideally grow, for years.

This changes what "a good sale" means. It's about bringing in a customer who's likely to renew, expand their usage over time, and not churn, meaning cancel. That's why customer success and account management, which we'll cover in the next chapter, are such important functions inside a SaaS company: a signed contract is closer to the start of the relationship than the end of it.

A few terms you'll see constantly in this world:

- **Contract.** The legal agreement that defines what's being sold, at what price, for how long, and under what terms. Most B2B software is sold under a contract, even if it's a simple one.
- **Annual contract value, or ACV.** The value of a single customer's contract over one year. If a company signs a two-year deal worth \$200,000 total, the ACV is \$100,000. This is the single most common way deal size gets described in B2B sales, and you'll hear it constantly once you're in the industry.
- **Annual recurring revenue, or ARR.** The total recurring revenue a company earns across all its customers in a year. If ACV is the size of one deal, ARR is the sum of all of them, and it's the primary health metric investors and executives use to judge how a SaaS company is doing.
- **Monthly recurring revenue, or MRR.** The same idea as ARR, but measured monthly instead of annually. Common at companies with lower-priced products and shorter, month-to-month contracts.
- **Churn.** The rate at which customers cancel or fail to renew. High churn is one of the most dangerous things that can happen to a SaaS business, because it means the company has to keep replacing revenue just to stay flat, let alone grow.
- **Net revenue retention, or NRR.** A measure of how much revenue a company keeps and grows from its existing customer base over time, accounting for both losses from churn and gains from upsells and expansions. A number above 100% means existing customers are spending more over time than they're losing to cancellations, which is a strong sign of a healthy business.
- **Total contract value, or TCV.** The full value of a contract across its entire length, as opposed to just one year. A three-year, \$50,000-per-year deal has an ACV of \$50,000 and a TCV of \$150,000.

You don't need to memorize all of this before you apply for your first job, but you should recognize these terms when you hear them, because they come up in job descriptions, interviews, and everyday conversation inside a sales organization.

How a business buying process differs from a consumer purchase

We touched on this in the introduction, but it's worth going deeper here because it explains a lot about how the rest of this guide is structured.

When a business decides to buy a piece of technology, it's rarely a single moment. It's a process, often a long one, that typically involves identifying a problem, researching potential solutions, narrowing down a shortlist, evaluating the finalists (sometimes through a formal trial or pilot), building an internal case for why the purchase is worth it, getting the right people to sign off, negotiating price and terms, and finally executing a contract. Depending on the size of the purchase and the size of the company, this can take anywhere from a few days to well over a year.

There's also the matter of who's involved. A small business might have one person who both wants the product and can approve the purchase. A mid-sized company might have a champion, meaning the internal advocate pushing for the purchase, plus a manager who needs to approve budget, plus an IT or security reviewer who has to sign off. An enterprise deal can involve a buying committee of six, eight, or ten people, each with their own priorities, and getting all of them aligned is a meaningful part of the salesperson's job. Recent industry data puts the average B2B buying committee at somewhere between six and ten stakeholders for complex deals, which is a real jump from the three-to-five person committees that were typical a decade or two ago.

Why some sales take days and others take months

The length of a sales cycle, meaning the time from first contact to signed contract, depends mainly on three things: the price of the product, how many people need to be involved in the decision, and how disruptive the change is to the buyer's existing operations.

A low-cost tool that one person can approve and that doesn't require any technical integration might close in a matter of days. This is common in what's sometimes called product-led growth, where a company lets users try or even fully use a lightweight version of the product before ever talking to a salesperson, and the sales conversation, if there is one at all, is short and focused on upgrading or expanding usage.

A mid-market deal, meaning a sale to a company of maybe 100 to 1,000 employees, often takes one to three months and typically involves several conversations, a demonstration of the product, and approval from at least a couple of people.

An enterprise deal, sold to a large organization with complex internal processes, can easily take six months to a year or more. These deals usually involve a formal evaluation process, a security review, a legal review of contract terms, and sign-off from multiple layers of leadership. Recent industry benchmarking puts typical enterprise B2B sales cycles somewhere in the six-to-eighteen-month range, depending on deal size and industry, and that number has generally been getting longer over the past several years as buying committees have grown and companies have become more cautious with spending.

Understanding this up front will shape how you experience the job day to day. If you're in a fast-cycle, high-volume sales environment, your days are built around speed and repetition. If you're in a long-cycle enterprise environment, your days are built around patience,

relationship management, and careful navigation of a complex process. Neither is better than the other. They're just different jobs, and knowing the difference will help you figure out which one fits you.

Chapter 2: The Different Types of Tech Sales Jobs

"Tech sales" isn't one job. It's a collection of related roles that work together to find customers, close deals, and keep those customers happy over time. If you're going to plan a way into the industry, you need to understand what these roles actually do, which ones are realistic starting points, and how people move between them.

Sales Development Representative, SDR

An SDR's job is to find and qualify potential customers before they're handed off to an Account Executive to close. Depending on the company, this work is split between outbound, meaning reaching out cold to people who haven't expressed interest, and inbound, meaning following up with people who've already shown some interest by filling out a form, downloading something, or requesting a demo. Some companies split these into two separate roles: SDRs handle inbound and warmer leads, while Business Development Representatives, or BDRs, handle outbound and colder prospecting. Other companies use the titles interchangeably or combine both functions into one role. Don't get hung up on the title; read the job description to understand what the actual day-to-day work involves.

A typical day for an SDR involves researching target accounts, making calls, sending personalized emails, engaging with prospects on LinkedIn, following up relentlessly on people who haven't responded, qualifying whether a prospect is a legitimate fit, and booking meetings for Account Executives. The job is measured heavily by activity and outcomes: number of calls made, meetings booked, and opportunities that eventually turn into real pipeline. It's a numbers-driven job with a lot of rejection built into it, and most experienced people in the industry will tell you honestly that it's the hardest job in tech sales, not the easiest, even though it's usually the lowest-paid and requires the least prior experience. It's also, by a wide margin, the most common entry point into the industry.

Business Development Representative, BDR

As mentioned above, BDR and SDR often describe nearly identical work, with BDRs somewhat more likely to be focused specifically on outbound, cold prospecting into net-new accounts rather than following up on inbound interest. Compensation between the two roles is close enough that it shouldn't be a major factor in your decision; what counts for more is whether the specific role is heavier on outbound cold outreach (which tends to be more demanding but builds stronger prospecting skills) or inbound lead follow-up (which tends to be a bit more predictable).

Account Executive, AE

An AE owns the deal from the point an opportunity is qualified through to a signed contract. This is the role most people picture when they imagine "sales," and it's usually the role SDRs and BDRs are working toward. An AE runs discovery calls to understand the prospect's problems, sometimes delivers or coordinates a product demonstration, builds a business case for why the purchase makes sense, manages the various stakeholders involved in the decision, negotiates pricing and contract terms, and closes the deal.

AE roles are usually segmented by the size of the company being sold to. An SMB, or small and midsize business, AE typically handles a high volume of smaller, faster-moving deals. A mid-market AE handles a moderate volume of mid-sized deals with a somewhat longer cycle. An enterprise AE handles a small number of very large, very long, very complex deals, often with a great deal of stakeholder management, internal coordination, and strategic account planning involved. Enterprise AE is generally considered a more advanced role that companies expect people to grow into rather than start in.

AE roles almost always require some prior sales experience, most commonly a stint as an SDR or BDR first, though people occasionally move directly into an AE role from a strongly relevant industry background, especially at smaller companies. It's a demanding, high-accountability role, but it's also where the largest share of the earning potential in tech sales lives.

Account Manager

An Account Manager typically owns the ongoing relationship with an existing customer, focused on retention, satisfaction, and sometimes upselling additional products or usage. At some companies this role is closely tied to Customer Success (below); at others it's a distinct, quota-carrying sales role focused specifically on renewals and expansion revenue. The line between "Account Manager" and "Customer Success Manager" varies a lot from company to company, so again, read the actual job description rather than relying on the title alone.

Customer Success Manager, CSM

A CSM is responsible for making sure a customer actually gets value out of the product after the sale closes, which drives renewal and reduces churn. This isn't usually a quota-carrying sales role in the traditional sense, though many CSM roles do carry renewal or expansion targets. The work involves onboarding new customers, checking in regularly, helping customers solve problems, identifying opportunities to expand usage, and flagging early warning signs that a customer might be at risk of leaving. This role rewards people who are naturally relationship-oriented, patient, and good at proactively identifying problems before they become crises.

Sales Engineer or Solutions Engineer, SE

An SE is the technical partner to the AE. Where the AE owns the relationship and the commercial side of the deal, the SE handles the technical side: running detailed product demonstrations, answering technical questions, designing proof-of-concept evaluations, and

reassuring technical stakeholders (like an IT or security team) that the product will actually work the way it needs to. This role usually requires a stronger technical background than other sales roles, sometimes a computer science degree or hands-on experience with the relevant technology, though the specific bar varies enormously depending on how technical the product is.

Partner and Channel roles

Some companies sell directly to customers; others sell partly or entirely through partners, meaning other companies that resell, integrate with, or refer business to them. A partner or channel manager builds and manages relationships with these third-party companies rather than selling directly to end customers. This role rewards someone who's good at relationship management and understands how to make an indirect sales motion work for everyone involved.

Sales Operations

Sales Ops is the function that keeps a sales team running efficiently: managing the CRM (more on this in Chapter 5), building reports and dashboards, designing territories and compensation plans, and generally making sure the sales team has the tools, data, and processes it needs. This is usually not a customer-facing quota-carrying role, and it tends to attract people who are strong analytically and enjoy process and systems work more than direct selling.

Revenue Operations, RevOps

RevOps is a broader version of Sales Ops that spans sales, marketing, and customer success, focused on aligning all three functions around a shared view of the customer journey and the data that describes it. It's become an increasingly important and well-compensated function as companies have recognized how much revenue gets lost when these teams don't talk to each other.

Sales leadership

Sales managers and directors lead teams of SDRs, AEs, or CSMs, responsible for coaching, hiring, forecasting, and hitting team-level targets. This is the natural next step for people who've had individual success in an IC role, meaning an individual contributor role, and want to move into people management. Above that sit VP of Sales and Chief Revenue Officer roles, which oversee the entire revenue organization.

Which roles are accessible to beginners, and which require experience

If you're starting from outside the industry with no prior sales background, SDR and BDR roles are, realistically, the most accessible entry point. Companies hire for these roles based on communication skills, coachability, work ethic, and resilience far more than prior experience, which is exactly why they're the standard first step for career changers.

Sales Operations and, to a lesser degree, Customer Success can also be accessible entry points for people with strong organizational or relationship skills, particularly if they have relevant experience from a previous career, like project management or customer service. Sales Engineering usually requires a technical background. AE, Account Manager, and Partner roles typically expect at least some direct sales experience, though a strong industry background can sometimes substitute for that at smaller companies, especially when the company is selling into the exact industry you came from.

How people move between roles over time

The most well-worn path in the industry is SDR or BDR to AE, typically taking twelve to twenty-four months, sometimes faster at smaller companies with less rigid structure, sometimes slower at larger companies with more formal promotion criteria. From AE, people generally move in one of a few directions: deeper into sales as a senior or enterprise AE, into people management as a sales manager, sideways into Customer Success or Account Management, or into more specialized functions like Sales Engineering, Partnerships, or Sales/Revenue Operations. We'll cover this progression in detail in Chapters 21 and 22, including what skills each transition actually requires.

The point to take away here is that your first job doesn't have to be your forever job, and it usually isn't. An SDR role is best understood as a paid education in how B2B sales works and a credibility-building step toward wherever you actually want to end up.

Chapter 3: You May Already Have Relevant Experience

This is probably the most important chapter in this guide, because it's the one that determines whether you believe you're allowed to try. A lot of people rule themselves out of tech sales because they've never held a job with "sales" in the title. That's a mistake, and it's worth explaining exactly why.

Selling, at its core, is a combination of skills: communicating clearly, understanding what someone else actually needs, building trust, managing a process, and working toward a defined outcome. Almost none of those skills are unique to sales jobs. They show up constantly in teaching, healthcare, customer service, hospitality, the military, and dozens of other fields. What you're missing when you come from outside the industry isn't the underlying skill set. It's the vocabulary, the specific mechanics of a sales process, and a resume that makes the connection obvious to a hiring manager who's skimming a hundred applications. This chapter is about closing that gap.

Teaching and education

Teachers are, in a very real sense, already professional communicators who've spent years doing something close to sales without calling it that. Consider what the job actually requires: explaining complex material to people who don't yet understand it, adjusting your explanation on the fly based on who's confused and why, presenting information to a group and holding their attention, managing a room full of different personalities and needs at once, building enough trust that people are willing to be vulnerable about what they don't understand, planning a curriculum toward a defined outcome, and tracking progress against that outcome over time.

Every one of those maps directly onto B2B sales. Discovery calls require listening for confusion and adjusting your questions. Demos require explaining a product clearly to people with different levels of familiarity. Managing a multi-stakeholder deal requires the same kind of patient, structured thinking a teacher uses to bring a whole class along together. Teachers who move into tech sales often find that learning to sell comes fairly naturally; the harder part is learning to describe their own experience in sales language on a resume. We'll fix that in Chapter 10.

Customer service

Customer service reps already know how to listen for the real problem underneath what a customer initially says, how to stay calm and useful when someone's frustrated, and how to explain a solution clearly and patiently. These are core discovery and objection-handling skills. The main gap to close is proactive outreach, since most customer service work is reactive (someone contacts you with a problem) rather than proactive (you're the one initiating contact

and building interest).

Hospitality

Anyone who's worked in hotels, restaurants, or events has spent real time reading people quickly, managing expectations under pressure, staying composed when things go wrong, and making someone feel taken care of even in a stressful moment. Hospitality workers often make a smooth transition into sales because they're comfortable with in-person and phone communication and used to a fast-paced, people-facing environment.

Retail

Retail workers understand product positioning, handling price objections, working toward daily and monthly targets, and reading buying signals, all skills that transfer directly to sales, especially SDR and AE roles. The main difference is scale and stakes: a retail sale is usually one person, a low dollar amount, and a short interaction, while a B2B sale involves multiple people, larger numbers, and a longer relationship. The instinct is transferable; the complexity is new.

Recruiting

Recruiters may have the single closest existing skill set to sales development work of anyone on this list. Sourcing candidates is prospecting. Screening candidates is qualification. Pitching a role to a candidate is a sales pitch. Managing a hiring process with a hiring manager, a candidate, and sometimes an agency is stakeholder management. Recruiters who move into SaaS sales, particularly into companies that sell recruiting or HR technology, often ramp up faster than almost any other background because the muscle memory is nearly identical.

Marketing and communications

Marketing and communications professionals already understand messaging, audience segmentation, and how to make a value proposition land with a specific audience. They're often strong writers, which is a real advantage in a job that involves a lot of email. What they sometimes need to build is comfort with live, real-time persuasion, since a lot of marketing work is written and asynchronous, while sales is heavily conversational and happens in the moment.

Journalism

Journalists are trained researchers and interviewers. Discovery, the part of a sales process focused on understanding a prospect's situation and problems, is functionally an interview. Journalists who move into sales often stand out for asking sharper, more specific questions than reps who came up through traditional sales training, because that's exactly the skill their previous career demanded of them every day.

Operations, project management, and administrative work

People from operations and project management backgrounds usually bring strong organizational discipline: tracking multiple things at once, managing deadlines, following a defined process, and keeping a lot of moving pieces coordinated. This maps well onto pipeline management, the discipline of tracking every deal in progress and knowing what needs to happen next on each one. Administrative professionals bring similar organizational strength along with, often, direct experience interacting with vendors and purchasing processes from the buyer's side, which is genuinely useful insight into how a business buying decision actually happens internally.

Entrepreneurship

Anyone who's started or run their own business has already done the hardest version of sales: convincing strangers to give you money for something that doesn't have the built-in credibility of an established brand behind it. Founders and small business owners often move into tech sales with strong instincts for finding customers, handling rejection, and staying resilient through a slow start, because they've already lived through a version of that with much higher personal stakes.

Healthcare

Healthcare professionals, from nurses to administrators to clinical staff, bring deep credibility and language fluency for selling into HealthTech and MedTech companies. They also tend to have strong composure under pressure and genuine comfort with high-stakes, emotionally loaded conversations, both of which transfer well into complex enterprise sales.

Technical support and IT

People with a technical support or IT background bring an advantage that's hard to overstate: they can speak credibly with technical buyers, understand how software integrates into existing systems, and troubleshoot in real time during a sales conversation. This background is a particularly strong fit for Sales Engineering roles, and also for AE roles at companies selling technical products like cybersecurity, infrastructure, or developer tools.

Finance

People with a finance background bring fluency in the language buyers use to evaluate a purchase: ROI, budget cycles, cost justification, and how a business case actually gets built and approved internally. This is a strong asset for selling FinTech specifically, but it's also broadly useful in any B2B sale, because a huge part of closing a deal is helping a champion build the internal financial case for buying.

Real estate and insurance

Both of these fields already involve full-cycle, commission-based selling with real stakes, real objections, and real negotiation. People from real estate and insurance backgrounds are often more prepared for the compensation structure of tech sales, meaning a base-plus-commission

model, than people from salaried backgrounds are, and they usually don't need to be taught how to handle rejection, because they've already lived it.

Nonprofit work

Nonprofit professionals, especially those who've done fundraising or development work, have direct experience building relationships with people who control budget, making a case for why something is worth funding, and following a long, patient process toward a "yes." That's a closer match to enterprise sales than most people realize.

Military experience

Veterans often bring exceptional discipline, the ability to follow a structured process under pressure, resilience, and comfort working within a clear chain of command and reporting structure, all of which are highly valued in sales organizations. Many tech companies run dedicated military hiring programs for exactly this reason, recognizing that the underlying qualities the military selects for and builds are closely aligned with what makes someone succeed in a demanding, target-driven sales role.

You don't have to leave your old industry behind

Here's the part of this chapter that's most useful for planning your actual move: your previous industry experience isn't just a source of soft skills. It can be a direct advantage if you sell into the same industry you came from. This is worth its own explanation, because it changes how you should think about your job search.

A former teacher exploring EdTech sales already understands how schools make purchasing decisions, who the real decision-makers are (which is often not who an outsider would assume), and what problems teachers and administrators actually complain about. A former marketer exploring MarTech sales already speaks the buyer's language fluently and understands their daily frustrations. A healthcare professional exploring HealthTech or MedTech sales brings clinical credibility that's very hard for a company to train into someone from scratch. A finance professional exploring FinTech, an HR professional exploring HRTech, a real estate professional exploring PropTech, a lawyer or paralegal exploring LegalTech, a retail operations person exploring RetailTech, a manufacturing professional exploring industrial technology, an IT or cybersecurity professional exploring infrastructure and security sales, a recruiter exploring recruiting or HR technology, a support professional exploring customer experience technology: in every one of these cases, the domain knowledge does real work for you.

It shortens the learning curve on the buyer's problems, since you've often lived those problems yourself. It gives you instant credibility in a discovery call, because you can speak in the buyer's own language instead of generic sales language. It helps you understand the actual buying process at these organizations, including who holds real influence versus who just has a senior title. And it gives a hiring manager a concrete, specific reason to take a chance on you

over another candidate with more generic sales experience but no industry background.

This is the single most underused strategy for career changers entering tech sales. Most people apply broadly to any "tech sales" job they can find. A sharper approach is to look first at companies selling technology into the industry you already know, because that's where your resume tells a story a hiring manager doesn't have to work hard to believe.

Chapter 4: Choosing a Technology Industry

"Tech sales" is a category, not a single industry, and the differences between the sectors underneath it are significant enough that they should shape where you apply. This chapter walks through the major technology sectors so you can start narrowing down where your background and interests actually fit.

SaaS (general/horizontal)

What's sold: software delivered as a subscription that solves a business function, like project management, communication, or document management, used across almost any industry. Who buys: operations leaders, department heads, IT. Common problems: inefficiency, lack of visibility, manual processes. Advantage for newcomers: this category is the broadest on-ramp into tech sales because the products are usually easier to understand than deeply technical or regulated categories, making it a common starting point for career changers with no specific industry background.

Artificial intelligence

What's sold: AI models, platforms, and AI-powered features layered into existing workflows, from customer support automation to coding assistants to content generation. Who buys: increasingly, everyone; AI purchasing decisions now touch nearly every department, though technical evaluation is often led by engineering or data teams. Common problems: labor cost, speed, and a sense of competitive urgency ("if we don't adopt this, our competitors will"). Advantage for newcomers: this is currently the fastest-hiring and fastest-growing corner of the industry, and because it's so new, a rigid "years of experience" requirement is less common. Genuine curiosity about how the technology works and works differently by vertical is a real asset here.

Cybersecurity

What's sold: tools that protect a business's systems, data, and networks. Who buys: Chief Information Security Officers, IT leaders, compliance teams. Common problems: risk of breach, regulatory compliance requirements, insurance requirements. Advantage for newcomers: prior IT, technical support, or military background is a strong credibility signal here, since buyers are often skeptical and highly technical.

Cloud infrastructure

What's sold: computing power, storage, and networking rented instead of owned. Who buys: engineering leaders, CTOs, infrastructure teams. Common problems: cost of running and scaling systems, reliability, performance. Advantage for newcomers: a technical background

helps significantly, since buyers are usually engineers, but infrastructure sales teams also need strong AEs who can manage the commercial and negotiation side while partnering with a technical Sales Engineer.

Data and analytics

What's sold: tools for storing, moving, and making sense of business data. Who buys: data teams, analytics leaders, sometimes finance or operations leadership who consume the output. Common problems: fragmented data, slow or unreliable reporting, inability to make data-driven decisions quickly. Advantage for newcomers: a background in finance, operations, or any analytically-minded prior role helps you speak credibly about why data quality and speed matter to a business.

Marketing technology (MarTech)

What's sold: tools that help marketing teams run campaigns, manage customer data, and measure results. Who buys: CMOs, marketing operations, growth and demand generation leaders. Common problems: proving marketing's return on investment, managing too many disconnected tools, personalizing communication at scale. Advantage for newcomers: former marketers have an unusually strong fit here, since they already speak the buyer's language and understand the buyer's daily frustrations firsthand.

Education technology (EdTech)

What's sold: software for schools, universities, and corporate training, covering everything from learning management to administrative and assessment tools. Who buys: school administrators, IT directors at institutions, sometimes teachers or department heads as champions, corporate learning and development leaders. Common problems: budget constraints, slow and bureaucratic procurement processes, proving impact on outcomes. Advantage for newcomers: former teachers and education administrators bring direct, credible understanding of both the buyer and the end user.

HealthTech and MedTech

What's sold: HealthTech is software used in healthcare operations, like patient records and scheduling; MedTech more often refers to devices and diagnostic technology. Who buys: hospital administrators, clinical leadership, procurement committees, sometimes physicians as champions. Common problems: patient outcomes, regulatory compliance, staff efficiency, cost pressure. Advantage for newcomers: healthcare professionals bring clinical credibility that's genuinely difficult to replace, and this sector often involves longer, more regulated sales cycles where that credibility carries even more weight.

FinTech

What's sold: payments, banking infrastructure, financial planning, and accounting tools. Who buys: finance leaders, controllers, treasury teams, sometimes banks and financial institutions

themselves as customers. Common problems: manual financial processes, fraud and risk, regulatory compliance, cash flow visibility. Advantage for newcomers: finance professionals already speak fluently in the terms buyers use to evaluate a purchase.

HRTech

What's sold: tools for hiring, payroll, benefits, and performance management. Who buys: HR leaders, talent acquisition teams, sometimes finance for payroll-adjacent tools. Common problems: talent shortages, compliance risk, employee experience, administrative burden. Advantage for newcomers: recruiters and HR professionals bring immediate fluency in both the buyer's vocabulary and their daily pain points.

PropTech

What's sold: software for real estate management, transactions, and operations. Who buys: property managers, real estate brokerages, developers. Common problems: manual leasing and management processes, tenant experience, market data access. Advantage for newcomers: real estate professionals bring direct buyer-side experience and existing industry relationships.

LegalTech

What's sold: tools for contract management, legal research, and case management. Who buys: law firms, in-house legal and compliance teams. Common problems: manual document review, compliance risk, cost of outside counsel. Advantage for newcomers: paralegals and legal professionals bring credibility with a buyer group that's often skeptical of outside vendors.

Sales technology

What's sold: tools sales teams use themselves, like CRMs, sales engagement platforms, and prospecting data tools. Who buys: sales and revenue operations leaders. Common problems: rep productivity, data quality, forecasting accuracy. Advantage for newcomers: anyone with prior sales or sales-adjacent experience, including SDR experience itself, already understands the buyer intimately, since the buyer's job looks a lot like the seller's own.

Customer service technology

What's sold: help desk, live chat, and customer support automation tools. Who buys: heads of customer support or customer experience. Common problems: response time, support cost, customer satisfaction. Advantage for newcomers: former customer service professionals understand this buyer's daily reality better than almost anyone else could.

Communications technology

What's sold: business phone, video, and messaging platforms. Who buys: IT leaders, operations leaders. Common problems: reliability, cost consolidation, remote and hybrid work support. Advantage for newcomers: broadly accessible; no specific prior background gives an

outsized edge here, which makes it a reasonable general entry point.

Developer tools

What's sold: software that helps engineers build, test, and deploy other software. Who buys: engineering leaders, individual developers who influence or make the purchase. Common problems: developer productivity, code quality, deployment speed. Advantage for newcomers: this sector strongly favors people with a technical or coding background, and it's one of the harder sectors to break into without one.

Ecommerce technology

What's sold: tools that help online retailers run their stores, from platforms to payments to fulfillment. Who buys: ecommerce leaders, operations teams at retail and consumer brands. Common problems: conversion rates, checkout friction, fulfillment cost and speed. Advantage for newcomers: retail and ecommerce operations experience translates directly.

Industrial technology

What's sold: software and hardware for manufacturing, logistics, and supply chain operations. Who buys: plant managers, operations and supply chain leaders. Common problems: downtime, efficiency, safety, visibility across a complex supply chain. Advantage for newcomers: manufacturing and operations professionals bring floor-level understanding that's hard for an outsider to fake.

How to research an industry before you apply

Before you commit your job search to a sector, spend a few hours actually learning it. Read the top two or three companies' websites and product pages closely. Search for recent news about the sector to understand where the money and hiring momentum currently sit. Look up a handful of job postings in that sector and read the qualifications and responsibilities carefully, not just the title. Search for the sector's name alongside words like "buyer," "trends," or "challenges" to see what the actual conversation in that industry sounds like right now. If you can, find someone working in that sector on LinkedIn and ask them a few honest questions, something we'll cover in detail in Chapter 14. None of this needs to take more than a few hours per sector, but it will put you meaningfully ahead of other applicants who apply based on the job title alone.

Chapter 5: How Tech Sales Companies Work

To understand your own role inside a technology company, it helps to understand how the whole revenue organization fits together. No single function closes deals alone; a lot of coordinated work happens behind every sale.

The core functions and how they connect

Marketing generates awareness and interest, producing content, running campaigns, and driving people to the company's website or events. Marketing typically owns the top of the funnel, meaning the earliest stage where a potential customer first becomes aware of the company.

Sales development, meaning SDRs and BDRs, takes the leads marketing generates (inbound) or proactively reaches out to accounts that fit the company's target profile (outbound), and works to turn interest into a qualified opportunity: a real, vetted chance at a deal.

Account Executives take that qualified opportunity and run the sales process through to a signed contract, as described in Chapter 2.

Sales Engineering supports AEs on deals that require technical depth, running demos and proof-of-concept evaluations and answering technical questions that go beyond what the AE can credibly answer alone.

Customer Success and Account Management take over once the deal is signed, focused on onboarding, adoption, renewal, and expansion.

Product builds the thing being sold, and stays close to sales and customer success to understand what customers actually need and where the product falls short.

Revenue Operations supports all of the above with data, tooling, and process, making sure the whole system runs efficiently and that leadership has accurate visibility into what's happening.

Leadership, meaning sales managers up through the Chief Revenue Officer, sets targets, allocates resources, and is accountable for the overall growth of the business.

How a lead becomes an opportunity, and how an opportunity moves through a pipeline

A "lead" is a person or company that's shown some level of interest or fits the company's target customer profile but hasn't been vetted yet. An SDR or BDR's job is to qualify that lead, meaning determine whether there's a real, timely, well-fitted potential deal there, and if so, turn it into an "opportunity," a term for a deal that's now being actively worked by an AE.

From there, the opportunity moves through a pipeline, a defined sequence of stages that most companies track closely: something like qualification, discovery, demonstration, proposal, negotiation, and closed-won (or closed-lost, if the deal falls through). Every company's exact pipeline stages differ slightly, but the underlying idea is the same everywhere: a deal is expected to move forward through a known sequence, and sales leadership tracks how many deals are sitting at each stage to forecast how much revenue is likely to close in a given period.

CRMs: what they are and why every company uses one

A CRM, or customer relationship management system, is the software a sales organization uses to track every lead, contact, deal, and interaction. Salesforce is the dominant CRM in enterprise B2B sales, and HubSpot is extremely common at small and mid-sized companies, particularly ones with a strong marketing and inbound motion. Other platforms exist too, but if you learn one system well before you interview, make it one of these two, since you'll very likely encounter one of them in your first job.

The CRM is more central to the job than it might sound like from the outside. Every call you make, every email you send, every meeting you book, and every stage a deal moves through typically gets logged there. Sales managers use it to coach reps and forecast revenue. Leadership uses it to understand the health of the whole business. A rep who's disciplined about keeping their CRM accurate and up to date is, in a very real sense, more valuable to a sales organization than a rep with equally good sales instincts who lets the data go stale, because bad data breaks everyone else's ability to plan.

How marketing and outbound sales work together

At most companies, marketing and sales development aren't separate, competing efforts; they're two halves of the same demand generation engine. Marketing typically handles broader, one-to-many efforts: advertising, content, events, and email campaigns designed to build awareness and generate inbound interest at scale. SDRs and BDRs typically handle more targeted, one-to-one efforts: personally researching and reaching out to specific accounts and specific people that fit the company's ideal customer profile, something we'll define more precisely in Chapter 8.

The two functions feed each other. Marketing content gives SDRs something relevant and specific to reference in outreach. SDR conversations give marketing direct insight into what messaging is and isn't landing with real prospects. At well-run companies, marketing and sales development leadership talk to each other constantly and adjust strategy based on what the other side is learning in the field. At poorly-run companies, the two functions operate in silos and blame each other when pipeline targets are missed. If you're evaluating a company to work for, it's worth asking, in an interview, how closely marketing and sales work together; the answer tells you a lot about how well-run the organization actually is.

Chapter 6: How a B2B Sale Happens

This chapter walks through a full sales process from start to finish, so you have a concrete picture of what actually happens between a company having never heard of a product and that same company signing a contract for it.

Finding potential customers

Every sale starts with identifying who's worth talking to. This begins with account research: understanding which companies fit the seller's ideal customer profile, meaning the type of company most likely to need and be able to afford the product, based on factors like company size, industry, technology already in use, and signs of relevant activity or growth.

Prospecting

Prospecting is the active work of reaching out to people at those target accounts. This usually happens across several channels at once: phone calls (cold calling), email, and LinkedIn, often combined into a structured sequence of touches over several days or weeks rather than a single attempt. We'll cover cold calling and email in detail in Chapters 17 and 18.

Inbound leads

Not every deal starts with outbound prospecting. Many start when a prospect reaches out first, by filling out a form, requesting a demo, or signing up for a free trial. Inbound leads are generally easier to convert than cold outbound prospects, since the person has already expressed some interest, but they still need to be qualified, since plenty of inbound interest doesn't turn into a real, well-fitted opportunity.

Qualification

Qualification is the process of determining whether a prospect is a real, viable opportunity: do they have a genuine problem the product solves, the budget and authority to buy, and a realistic timeline. This is where frameworks like BANT and MEDDPICC come in, which we'll cover in depth in Chapter 9. Qualification isn't a one-time checkbox; it's revisited and refined throughout the sales process as more information comes in.

Discovery

Discovery is the conversation, or series of conversations, where the salesperson works to genuinely understand the prospect's situation: their current process, their specific pain points, who else is involved in the decision, what success would look like for them, and what's driving the timeline. Good discovery is mostly listening and asking sharp follow-up questions, not pitching. A common mistake among new salespeople is rushing past discovery to get to the demo, which usually backfires, because a demo that isn't grounded in the prospect's specific problems tends to fall flat.

Demonstrations

A demo is a walkthrough of the product, ideally tailored to the specific problems uncovered during discovery rather than a generic tour of every feature. For technically complex products, this stage often involves a Sales Engineer working alongside the AE.

Technical evaluation

For more complex or higher-stakes purchases, the prospect's technical team may run a formal evaluation, sometimes called a proof of concept or a pilot, actually testing the product against their real use case before committing.

Business case development

For a purchase to get approved, someone inside the buying company, ideally the salesperson's internal champion, usually has to build a case for why it's worth the cost: what problem it solves, what it will save or generate, and why now is the right time. A good salesperson actively helps their champion build this case rather than leaving them to do it alone, often providing materials like ROI calculations, case studies, and reference customers.

Stakeholder management

As discussed in Chapter 1, most B2B deals involve multiple people with different priorities. Managing these stakeholders, meaning understanding who they are, what they each care about, and how to keep them all moving toward "yes" at roughly the same pace, is one of the most important and hardest-to-teach skills in enterprise sales.

Negotiation

Once a prospect is ready to move forward, negotiation covers price, contract length, payment terms, and any custom terms either side wants. This stage rewards preparation and a clear understanding of what you can and can't flex on, more than aggressive tactics.

Procurement and legal review

At larger companies, a purchase often has to pass through a procurement team, which manages vendor relationships and negotiates commercial terms on behalf of the business, and a legal review, which checks the contract for risk. This stage can add real time to a deal, and experienced salespeople learn to start it early rather than waiting until everything else is agreed.

Contracting and closing

Once terms are agreed and legal review is complete, the contract is signed, commonly through an electronic signature tool, and the deal is officially closed. Salespeople refer to this as "closed-won."

Customer handoff

After the contract is signed, the account typically gets handed off to Customer Success or an Account Manager for onboarding and ongoing management. A clean handoff, where the new team already understands the customer's goals and concerns instead of starting from zero, makes a real difference in how the relationship starts.

Expansion and renewal

The relationship doesn't end at signing. Over the life of the contract, the customer may expand their usage (buying more seats, more features, or additional products) or come up for renewal, where the case for continuing has to be made again. As covered in Chapter 1, this ongoing revenue is the financial engine of most SaaS businesses, which is why the initial sale is treated as the beginning of a relationship rather than the end of one.

Every company's process is a little different, and deal size changes everything

The sequence above is a general template, not a universal rulebook. Every company defines its own pipeline stages, its own qualification criteria, and its own internal process, and you'll learn your specific employer's version in training.

The clearest way to see how much deal size changes this process is to compare two extremes. A small business buying a \$50-a-month tool might go from first contact to signed contract in a single call, with one person making the whole decision on the spot. A large enterprise buying a \$500,000-a-year platform might spend four months just on the technical evaluation, involve a dozen stakeholders across five departments, run the contract through six weeks of legal review, and take the better part of a year altogether. Both are B2B sales. Both use some version of the process outlined above. But they feel like almost entirely different jobs day to day, which is exactly why it's worth thinking carefully, before you take a role, about which end of that spectrum you actually want to work in.

Chapter 7: Sales Skills to Learn

Some of these skills you already have in some form, based on Chapter 3. Others you'll build on the job. This chapter breaks down the core skill set of B2B sales, what each one actually looks like in practice, and where a true beginner should focus first.

Communication. The ability to explain something clearly, adjust your language for who you're talking to, and be understood the first time. In practice, this looks like describing a product's value in a single, plain sentence rather than a jargon-heavy paragraph.

Listening. Genuinely paying attention to what a prospect says, including what they don't say directly, rather than waiting for your turn to talk. In practice, this looks like asking a follow-up question that shows you actually caught the detail they mentioned in passing.

Research. Understanding a prospect's company, role, and likely priorities before you ever talk to them. In practice, this looks like referencing something specific and recent about their business in a first outreach email instead of sending something generic.

Business understanding. A working knowledge of how companies make money, what their common priorities are (growing revenue, cutting costs, reducing risk, improving efficiency), and how a purchase decision typically gets made. In practice, this looks like being able to explain, in the buyer's terms, why your product is relevant to their specific business goals.

Curiosity. A genuine interest in understanding how a business works and what's actually going wrong for the person you're talking to. In practice, this looks like asking a "why" question instead of moving straight to a pitch.

Questioning. Structured, purposeful questions that move a conversation toward real understanding rather than small talk. This is closely tied to the sales methodologies covered in Chapter 9.

Presentation. The ability to walk someone through information, whether that's a product demo or a summary of next steps, in a clear, organized way. In practice, this looks like structuring a demo around the prospect's specific problems rather than a generic feature tour.

Writing. Clear, concise written communication, since a large share of sales happens over email and in written follow-ups. In practice, this looks like a short, specific email that gets a response, rather than a long one that gets ignored.

Prospecting. The active work of identifying and reaching out to potential customers, covered in depth in Chapter 8.

Cold calling. Reaching out by phone to someone who hasn't previously engaged with you, covered in depth in Chapter 17.

Email outreach. Reaching out in writing, covered in depth in Chapter 18.

Qualification. Determining whether a prospect is a real, viable opportunity, covered in Chapter 6 and Chapter 9.

Discovery. Understanding a prospect's situation deeply enough to know whether and how your product actually helps them, covered in Chapter 6.

Negotiation. Working through price, terms, and conditions to reach an agreement both sides are comfortable with. In practice, this looks like understanding what you can flex on and what you can't before you enter the conversation, rather than improvising under pressure.

Organization. Keeping track of multiple deals, contacts, and next steps at once without letting things fall through the cracks.

Time management. Balancing prospecting, active deals, internal meetings, and administrative work like CRM updates within a limited day.

CRM management. Keeping your deal records accurate and current, covered in Chapter 5.

Pipeline management. Actively managing the full set of deals you're working, understanding which ones are healthy, which are stalling, and where you need to focus your time.

Forecasting. Predicting, with reasonable accuracy, which deals will close and when. This becomes more important as you move from SDR into an AE role, since AEs are typically expected to forecast their own pipeline to their manager.

Account research. Understanding a specific company deeply enough to have a genuinely relevant conversation, distinct from general research skill, this is about a specific target account.

Stakeholder management. Understanding and managing the different people involved in a buying decision, covered in Chapter 6.

Where a true beginner should focus first

If you're starting from zero, don't try to master all of this at once; you can't, and no one expects you to walk in the door already good at forecasting or enterprise negotiation. Focus first on communication, listening, and research, since these are the skills that show up immediately in an interview and in your first weeks on the job, and they're also the skills that are hardest to fake. Everything else, prospecting mechanics, CRM discipline, qualification frameworks, negotiation, gets taught and built through repetition once you're in a role. What gets you into the role in the first place is being able to demonstrably communicate clearly, listen well, and show that you've done your homework on the company and the role you're applying for.

Chapter 8: What an SDR or BDR Actually Does

This chapter is meant to strip away the vague, motivational version of this job description and give you a realistic picture of what the day-to-day work looks like, because this is very likely where you'll start.

The building blocks of the role

Account lists. SDRs and BDRs work from a defined list of target accounts, usually built by sales or marketing leadership based on the company's ideal customer profile.

Ideal Customer Profile, or ICP. A description of the type of company most likely to buy and succeed with the product, usually defined by factors like industry, company size, technology already in use, and growth signals. A strong ICP fit dramatically changes how a conversation goes; reaching out to a company that's a poor fit almost never works, no matter how good the pitch is.

Buyer personas. A description of the type of individual person, by role and title, most likely to care about the product and have influence over the purchase. An SDR targeting a cybersecurity product, for example, might have personas for a CISO, an IT director, and a compliance manager, each of whom needs a slightly different message.

Prospecting. The daily work of researching and reaching out to people who fit the ICP and personas, across calls, emails, and LinkedIn, described in Chapter 6.

Sequences. A structured, pre-planned series of touches, combining calls, emails, and LinkedIn messages, spread out over a defined period, usually one to three weeks. Most companies use sales engagement software (like Outreach or Salesloft) to manage and automate the scheduling of these sequences, though the actual calls and personalized messages still require a human.

Follow-up. Persistently and professionally continuing to reach out to a prospect who hasn't responded yet. The data on this is consistent and a little uncomfortable for beginners: most meetings booked in outbound sales come after multiple attempts, not the first one. Giving up after one or two tries is one of the most common reasons new SDRs underperform.

Qualification. Determining, usually through a short conversation, whether a prospect who's shown interest is worth passing to an AE.

Booking meetings. The primary, most visible output of the SDR role: securing a scheduled conversation between a qualified prospect and an AE.

CRM updates. Logging every call, email, and outcome so the data stays accurate for the AE who eventually inherits the deal, and for the SDR's own manager who's coaching and

evaluating their performance.

Working with Account Executives. SDRs typically support one or more specific AEs, coordinating on target accounts, handing off qualified meetings, and sometimes sitting in on early calls to learn how a full deal is run.

How the role gets measured

SDR and BDR performance is tracked closely, usually across three layers of metrics: activity metrics (calls made, emails sent, LinkedIn touches, generally the leading indicators of effort), meeting metrics (meetings booked and, importantly, meetings that actually show up and happen, since a booked meeting that gets cancelled or no-showed doesn't count for much), and pipeline metrics (how many of those meetings turn into real, qualified opportunities, and eventually into closed revenue, which is the ultimate measure of whether the SDR's work is actually contributing to the business, not just generating busywork).

Common challenges in the role

The volume of rejection is the single biggest adjustment for most new SDRs. Cold outreach has a low response rate by design; most calls won't connect, most emails won't get a reply, and most of the people who do respond will say no. This is normal, expected, and not a reflection of your ability, but it takes real emotional discipline to internalize that on a daily basis, especially in the first few months. It's also worth being aware of the broader hiring picture here: SDR hiring overall has softened somewhat industry-wide as companies lean more on AI tools for early-stage prospecting, even as some AI-native companies are hiring aggressively and paying well for the role. That means the role hasn't disappeared, but it increasingly rewards SDRs who can do the things AI can't yet do well: handle nuanced objections, build genuine rapport, and manage complex, multi-touch relationships, rather than SDRs who are only capable of high-volume, low-personalization outreach.

What new BDRs often underestimate

Most new BDRs underestimate how much research and personalization actually pays off. It's tempting to send the same email to fifty people and hope volume makes up for quality; in practice, personalized, specific outreach consistently outperforms generic mass outreach by a wide margin, and this gap has only grown as prospects have gotten better at instantly recognizing and ignoring generic messages. New BDRs also frequently underestimate how much of the job is about consistency over a long stretch of time rather than a single great week. A slow first month is normal and doesn't predict failure; a slow first quarter with no adjustment to approach is a real warning sign worth addressing with a manager.

What strong BDRs tend to do consistently

Strong BDRs treat their target list with real discipline, prioritizing accounts that genuinely fit the ICP instead of spreading effort evenly across a list that includes a lot of poor fits. They personalize enough to be credible without spending so long researching each prospect that

their overall volume collapses; this is a balance that improves with practice. They follow up methodically rather than giving up early. They keep their CRM data clean, which makes them easier to coach and helps their manager and AE partners trust their work. And they treat every rejection as information rather than as a personal verdict, adjusting their approach based on what they're hearing rather than repeating the same pitch regardless of the response it's getting.

Chapter 9: Building Knowledge Before Applying

You don't need formal sales training to become a credible candidate. What you need is enough exposure to the industry's vocabulary, tools, and thinking that you can hold your own in an interview and sound like someone who's done real homework rather than someone applying on a whim. Here's how to build that credibility before you ever submit an application.

Learn the basic vocabulary

Chapters 1, 2, 5, and 6 of this guide already cover the core terminology: ACV, ARR, MRR, churn, pipeline, discovery, qualification, and so on. Reread those chapters and make sure the terms feel natural before you start applying, because interviewers use this language casually and it stands out, in a good way, when a candidate with no formal sales background already speaks it fluently.

Study technology companies directly

Pick a handful of companies you're interested in and spend real time on their websites: their homepage, product pages, customer case studies, and pricing page if they publish one. Case studies in particular are useful, since they usually describe the exact problem a customer had and how the product solved it, which is close to the actual language you'll need to use in a discovery conversation.

Read job descriptions closely

Don't just skim the title. Read the full list of responsibilities and qualifications for several SDR or AE postings, even at companies you're not immediately applying to. This will teach you the specific language each company uses for the same underlying work, and it will help you notice patterns in what's actually expected of the role, beyond generic phrases like "self-starter" and "team player."

Listen to sales calls and watch demos when you can

Some companies post recorded demo webinars or sales content publicly. Sales podcasts and YouTube channels focused on B2B sales often include real or recreated call breakdowns. Watching or listening to how an experienced rep structures a conversation, asks questions, and handles pushback is one of the fastest ways to absorb the rhythm of the job before you're actually doing it.

Follow people in the industry

Following experienced SDRs, AEs, and sales leaders on LinkedIn exposes you to ongoing, current conversation about what's working and what's changing in the industry, including

shifts like the growing role of AI in prospecting that we mentioned in the previous chapter. This also naturally sets you up for the networking work covered in Chapter 14.

Learn how businesses make money and how buyers evaluate a purchase

A basic understanding of business fundamentals, revenue, cost, margin, return on investment, goes a long way in B2B sales, because it lets you understand why a buyer cares about what they care about. You don't need an MBA. You need to understand, in plain terms, that most businesses are trying to grow revenue, control costs, reduce risk, or improve efficiency, and that almost every B2B purchase gets justified in terms of one or more of those four things.

Sales methodologies, explained at a beginner level

A sales methodology is a structured approach to qualifying and running a deal. You'll hear these terms constantly once you're in the industry, and it's worth understanding the basics of the major ones, though you shouldn't feel pressure to master any of them before you have a job; most companies train reps on their specific chosen methodology once you're hired.

BANT stands for Budget, Authority, Need, and Timeline. It's the oldest and simplest of the major frameworks, essentially a quick checklist for whether a prospect is worth pursuing: do they have money to spend, the authority to decide, an actual need, and a reasonable timeframe. It works well for fast, simple, lower-cost sales, and it's commonly used as an early filter even at companies that use a more advanced methodology for later stages of the deal.

SPIN Selling was developed by researcher Neil Rackham based on analysis of tens of thousands of real sales calls, and it's built around a specific sequence of questions: Situation questions establish the prospect's current setup, Problem questions surface specific frustrations, Implication questions explore the cost or consequence of not solving that problem, and Need-Payoff questions get the prospect to articulate the value of solving it themselves. It's widely used as a foundational discovery framework, particularly for newer reps, because it teaches disciplined, structured questioning rather than jumping straight to a pitch.

The Challenger Sale, based on research popularized in a well-known sales book of the same name, argues that the strongest sales reps don't just respond to what a customer says they need; they teach the customer something new about their own business, tailor that insight to the specific customer, and take control of the sales conversation with appropriate confidence. It's generally considered a more advanced approach, well suited to complex, competitive, insight-driven enterprise sales, and less suited to simple, transactional deals.

MEDDIC, and its expanded version MEDDPICC, is a qualification framework built for complex, multi-stakeholder enterprise deals. MEDDIC stands for Metrics, Economic Buyer, Decision Criteria, Decision Process, Identify Pain, and Champion. MEDDPICC adds Paper Process (the procurement, legal, and contracting steps a deal has to pass through) and Competition

(understanding who else the prospect is evaluating). It's widely used at enterprise-focused B2B companies, particularly for larger deals, because it forces a rep to rigorously verify things like "do I actually know who has final budget authority" and "do I have a genuine internal champion" rather than assuming the deal is healthier than it actually is.

Consultative selling is a broader philosophy rather than a strict step-by-step framework: the idea that a salesperson should act more like a trusted advisor helping a customer solve a real problem than like someone pushing a product. Most modern methodologies, including SPIN and Challenger, are built on some version of this underlying philosophy.

None of these approaches is universally "correct." Different companies choose different methodologies based on their deal size, sales cycle, and market, and some blend elements of several. What's useful for you right now isn't picking a favorite; it's recognizing these terms when they come up in a job posting or interview, and understanding roughly what each one is trying to accomplish. Your future employer will train you on whichever one they actually use.

Chapter 10: Building a Sales Resume

Your resume's job isn't to list what you did. It's to convince a hiring manager, quickly, that what you did is relevant to what they need. This chapter shows you how to translate real experience from a non-sales background into language a sales hiring manager immediately understands.

Lead with evidence and outcomes, not duties

A weak resume line describes a responsibility: "Handled customer inquiries and resolved issues." A strong resume line describes an outcome, ideally with a number attached: "Resolved an average of 40+ customer inquiries daily with a 95% satisfaction rating, consistently ranked in the top 10% of the team." The second version tells a hiring manager something specific and comparable, and it signals that you're already thinking in the outcome-oriented way sales roles require.

Examples of translating experience into sales-relevant language

Teachers. Instead of "Taught a classroom of 30 students," try something like "Delivered daily instruction and presentations to 30+ students with varying comprehension levels, adapting communication style in real time to keep the group engaged and on pace with curriculum goals; consistently ranked among top-performing teachers in student progress assessments." This foregrounds the exact skills, adapting communication, presenting to a group, working toward a measurable outcome, that a sales hiring manager is looking for.

Customer service professionals. Instead of "Answered customer calls and emails," try "Managed 50+ customer interactions daily across phone and email, resolving issues on first contact 85% of the time and maintaining a customer satisfaction score in the top quartile of the team." This emphasizes volume, resolution rate, and relative performance, all things a sales manager evaluates candidates on.

Recruiters. Instead of "Sourced and screened candidates for open roles," try "Managed a pipeline of 60+ active candidates simultaneously, sourcing, screening, and closing candidates on offers, filling an average of 8 roles per month while maintaining strong relationships with hiring managers as internal stakeholders." Note the direct parallel language here: pipeline, closing, stakeholders. That's not an accident. It's the same underlying work described honestly, in terms a sales leader will recognize instantly.

Retail workers. Instead of "Assisted customers on the sales floor," try "Consistently ranked in the top 15% of sales associates company-wide, exceeding monthly sales targets by an average of 20% through proactive customer engagement and product knowledge." If your store tracked any kind of ranking, attainment percentage, or award, use it; retail is one of the few non-sales fields where you likely already have real, quota-style performance data available.

Marketing professionals. Instead of "Managed social media and email campaigns," try "Built and executed email campaigns to a list of 15,000+ contacts, driving a 22% average open rate and directly contributing to a 30% increase in qualified leads over two quarters." This shows you already think in terms of audience, conversion, and measurable pipeline contribution.

Operations professionals. Instead of "Managed daily operational tasks," try "Coordinated logistics and vendor relationships across a 12-person team, reducing process turnaround time by 25% through improved scheduling and communication systems." This shows organizational discipline and a track record of driving measurable improvement, both directly relevant to pipeline and account management.

Technical support professionals. Instead of "Provided technical support to customers," try "Diagnosed and resolved technical issues for 500+ enterprise accounts, maintaining a 90% first-call resolution rate while explaining complex technical concepts to non-technical stakeholders." This is close to ready-made language for a Sales Engineering or technical AE application, since it already demonstrates the exact skill of translating technical complexity for a business audience.

How to use numbers honestly

Numbers make a resume credible, but only if they're accurate. Don't invent a statistic you can't defend if asked about it in an interview. If your previous employer tracked something, a ranking, a percentage, a volume, a satisfaction score, use the real figure. If you genuinely don't know an exact number, use a reasonable, honest estimate and describe it as such if asked directly ("roughly," "an average of"), rather than presenting a guess as a precise fact.

What to do when your previous job had no revenue targets

Most non-sales jobs don't come with a quota, and that's fine; a hiring manager doesn't expect a teacher's resume to include a sales number. What they're looking for instead is any evidence of these things:

- Volume. How much did you actually handle: students, calls, accounts, transactions, projects. Scale on its own is a useful signal.
- Performance. Any ranking, rating, review score, or comparison to peers, even an informal one like "recognized as employee of the month three times."
- Customers or stakeholders. How many people or organizations you interacted with or were responsible for.
- Projects. Specific initiatives you led or significantly contributed to, especially ones with a clear before-and-after result.
- Efficiency. Anywhere you made something faster, cheaper, or smoother than it was before you touched it.

- Retention. Any measure of people or customers staying engaged, renewing, or coming back, which maps directly to the retention and churn concepts covered in Chapter 1.
- Conversion. Any measure of moving people from one stage to another: applicants to hires, leads to customers, inquiries to resolutions.
- Rankings and awards. Any formal or informal recognition that shows you stood out relative to peers.
- Responsibility. The scope of what you were trusted to own, especially if it grew over time, which shows a track record of earned trust.

You don't need every one of these on every resume line. Pick the two or three that are strongest for each role you've held and build your bullets around those.

A note on resume format and length

Keep it to one page if you have less than roughly ten years of professional experience, two pages if you have more. Use a clean, simple format without heavy graphics or unusual fonts, since many companies run resumes through automated screening software before a human ever sees them, and overly designed resumes sometimes parse poorly. Put a short, focused summary at the top, two or three sentences that state clearly what you're pursuing and why your background is relevant, since this immediately orients a hiring manager who's skimming quickly.

Chapter 11: Building a LinkedIn Profile for Tech Sales

Your resume gets you through a specific application. Your LinkedIn profile works constantly, in the background, whenever a recruiter searches for candidates, whenever someone you've networked with looks you up before a call, and whenever a hiring manager checks you out after seeing your resume. It's worth investing real time in.

Headline

Your headline is the first thing anyone sees, right under your name, and it shows up in search results across the platform. Rather than leaving it as your current job title, use it to signal your direction. Something like "Customer Success Professional Transitioning into B2B SaaS Sales | Former Teacher | Strong Communicator" tells a recruiter searching for sales candidates exactly what they need to know in one line, without pretending to have experience you don't have.

About section

This is your space to tell a short, honest story connecting your background to where you're headed. A strong structure looks something like: a sentence on your current or most recent background, a sentence connecting the skills from that background to sales, a sentence on what specifically draws you to tech sales (and ideally, to the specific sector or type of company you're targeting), and a closing line inviting connection or conversation. Keep it under 150 words. Don't oversell; a recruiter can tell the difference between genuine, specific interest and generic enthusiasm.

Experience section

Use the same translated, outcome-focused language from your resume, described in Chapter 10, in each of your experience entries. LinkedIn allows more room than a resume, so you can include two or three bullets per role instead of one or two.

Skills section

List the specific skills relevant to the roles you're targeting: communication, relationship building, and anything directly relevant from your prior field, alongside sales-specific terms you've genuinely started learning, like CRM familiarity if you have any, or specific methodologies if you've studied them. Don't list skills you can't speak to at all in an interview.

Featured section

If you have anything concrete to show, a project you led, a piece of writing, a presentation, use the Featured section to surface it. This is optional, but it's a strong differentiator if you have something genuine to include, since it gives a hiring manager tangible proof rather than just a

claim.

Recommendations

A short, specific recommendation from a former manager or colleague, ideally one that speaks to communication, work ethic, or results, adds real credibility. Don't be afraid to ask directly; most people are happy to write one if you ask specifically and make it easy for them, for instance by reminding them of a project or result they could reference.

Networking and content

Connect with people in the industry you're targeting, particularly people in roles similar to the one you want next, using the approach covered in Chapter 14. You don't need to post content regularly to benefit from LinkedIn, but occasionally commenting thoughtfully on posts from people in your target industry, or sharing a short, genuine reflection on something you've learned while studying the field, keeps you visible and reinforces the direction you've stated in your headline and about section.

Positioning honestly as a career changer

The goal of all of this isn't to disguise the fact that you're changing careers; it's to make the change legible and credible. A recruiter looking at a profile that clearly says "here's my background, here's why it's relevant, here's where I'm headed" is far more likely to take a chance on you than one looking at a profile that either hides the career change entirely or, worse, implies sales experience you don't actually have. Career changers get hired into tech sales constantly; being straightforward about the transition is a strength, not a liability, when it's paired with a clear, specific case for why your background fits.

Chapter 12: Finding the Right Companies

Not every technology company is a good place to start a sales career, and a recognizable name isn't, by itself, a reason to prioritize one employer over another. This chapter walks through what to actually evaluate before you apply.

Product

Would you be comfortable explaining and defending this product to a skeptical stranger every day? Do you understand, at least at a basic level, what problem it solves? If you can't get genuinely interested in the product itself, the job gets a lot harder, since enthusiasm, even a realistic, grounded kind, comes through in sales conversations and its absence is noticeable too.

Customer

Who does the company actually sell to, and does that match an audience you'd be comfortable and credible talking to, given your own background? This connects directly back to Chapters 3 and 4.

Industry and company stage

Is the company an early-stage startup, a growth-stage company, or an established, mature business? Each stage comes with real tradeoffs. Early-stage companies often offer less structure and training but broader responsibility and faster learning, plus equity that could be worth something or could be worth nothing. Growth-stage companies often offer the most aggressive compensation packages as they compete hard for proven talent, along with real, if not always fully mature, structure. Established companies typically offer the most structured onboarding and training, more predictable compensation, and a lower-risk environment, sometimes at the cost of a slower pace and less individual autonomy.

Funding and financial stability

For startups specifically, it's worth understanding, at a basic level, how well funded the company is and how much runway it has, meaning how long it can operate before it needs more funding or becomes profitable. This information is often publicly available through funding announcements and industry press. A company that's recently raised a substantial funding round is generally a safer bet than one that raised money a long time ago with no recent news, though this isn't a perfect signal on its own.

Growth and leadership

Is the company growing, and does its leadership team, particularly its sales leadership, have real experience building sales organizations before? A sales leader with a track record of scaling teams elsewhere is generally a much stronger signal for your own development than a

sales leader in their first leadership role at their first company, though the latter isn't automatically disqualifying.

Sales team structure, training, and promotion paths

Does the company have a defined, structured onboarding program for new SDRs, or are you expected to figure it out on your own? Is there a clear, documented path from SDR to AE, with reasonably transparent criteria, or is promotion vague and informal? These questions are entirely fair to ask directly in an interview, and a company's willingness to answer them clearly is itself useful information.

Territory, compensation, and quota

Understand what territory or account list you'd actually be working, what the realistic quota looks like, and how compensation is structured, covered in detail in Chapter 19. Don't rely on the headline OTE number alone; ask about realistic attainment.

Sales cycle and product-market fit signals

A longer sales cycle generally means a more complex, patient job; a shorter cycle generally means a faster-paced, higher-volume job, as covered in Chapter 1. Product-market fit, meaning how well the product's value is proven and how naturally it sells to its target market, is harder to assess from the outside, but customer reviews, case studies, and how confidently a company can explain its own value proposition in an interview are all reasonable indicators.

Customer and employee reviews

Sites where customers review software products can give you a genuine, if imperfect, read on whether the product actually delivers value, which has a real effect on how hard your job will be. Sites where employees review companies can give you a read on culture, management quality, and how realistic the compensation and promotion promises actually are in practice, though it's worth reading these with some skepticism, since both especially positive and especially negative reviews can be unrepresentative.

A recognizable name isn't automatically the best starting point

It's tempting to prioritize a company you've heard of, but a well-known name doesn't guarantee good training, a healthy team, or a realistic quota; some of the most recognizable companies in tech have large, impersonal sales organizations where a new SDR gets relatively little individual coaching. A smaller, less well-known company can offer broader exposure, since you may end up doing a wider range of tasks and getting closer to senior decision-makers, along with more direct mentorship from experienced leaders, simply because the team is small enough that everyone works closely together. A larger company can offer more structured, formal training and a clearer, more predictable path, along with the resume credibility that comes from a recognizable name. Neither is objectively better; it depends on how you learn best and what you're optimizing for in your first year.

Chapter 13: How to Find Tech Sales Jobs

Where to search

LinkedIn is the single most important platform for tech sales job searching, both for browsing postings directly and for researching companies and people, as covered in Chapters 11 and 14.

Company career pages are worth checking directly for companies on your target list from Chapter 12, since some roles are posted there before, or instead of, being posted to broader job boards.

Job boards, including general ones and boards specifically focused on sales roles, aggregate postings from many companies and let you filter by title, location, and other criteria.

Professional communities, including online groups and forums specifically for SDRs, sales development professionals, and career changers into tech, often share job leads, company insights, and interview experiences that aren't available anywhere else.

Recruiting firms, including agencies that specialize specifically in sales hiring, sometimes work directly with companies to fill SDR and AE roles and can be a genuinely useful channel, particularly because they often know about roles before they're publicly posted.

Networking and referrals, covered in depth in Chapter 14, are consistently one of the highest-converting paths into a new role, since an internal referral gets a resume in front of a real person instead of into an automated queue.

Direct outreach to a hiring manager or sales leader at a target company, essentially applying the same prospecting skills you're trying to get hired for to your own job search, is a genuinely underused tactic that stands out precisely because so few candidates do it.

Search using the right titles and keywords

Because titles vary so much between companies, as covered in Chapter 2, search broadly using multiple terms rather than relying on a single title. Useful search terms include:

- Sales Development Representative, SDR
- Business Development Representative, BDR
- Inside Sales Representative
- Commercial Sales Representative
- Associate Account Executive
- Junior Account Executive
- Sales Trainee or Sales Associate

It's also worth searching by industry keyword combined with a sales title, for instance "cybersecurity SDR" or "HealthTech BDR," particularly if you're pursuing the industry-alignment strategy described in Chapter 4.

How to organize a job search

Treat your job search like a real project, not a background task you do when you happen to have a spare hour. Keep a simple tracking system, even a basic spreadsheet, with the company name, role, date applied, status, and any contact you've made there. This does two things: it prevents you from losing track of where you stand with each company, and it lets you see, honestly, whether your search is producing enough activity to realistically expect results. A search with five total applications over a month is a different situation than one with fifty, and it's worth being honest with yourself about which one you're actually running.

Chapter 14: Networking Without Being Awkward

Networking makes a lot of people uncomfortable, especially when you're the one asking for something. It doesn't have to be uncomfortable if you approach it honestly, with a clear, modest ask, and genuine curiosity rather than a hidden agenda.

The basic idea: informational conversations

An informational conversation is a short, low-pressure conversation with someone already working in the role or industry you're interested in, with the explicit goal of learning, not asking for a job directly. Most people who work in sales are, unsurprisingly, comfortable talking to people and generally willing to spend fifteen or twenty minutes helping someone genuinely trying to break in, especially if the ask is specific and respectful of their time.

How to ask for one

Keep the initial message short, specific about who you are and why you're reaching out, and clear about exactly what you're asking for. Don't ask for a job in the first message; ask for their perspective.

Example messages

Contacting an SDR or BDR:

"Hi [Name], I'm exploring a move into tech sales after [X years] in [your field], and I'm trying to learn more about what the SDR role actually looks like day to day. I saw you're an SDR at [Company] and would really appreciate 15 minutes of your time if you're open to it. Happy to work around your schedule."

Contacting a sales leader:

"Hi [Name], I'm researching a transition into B2B sales, currently in [your field], and I'm trying to understand what makes someone successful in an entry-level sales role from a leader's perspective. I'd really value 15 minutes of your time if you're open to it, no pressure at all if not."

Contacting someone who transitioned from another career:

"Hi [Name], I noticed you moved into tech sales from [their previous field], which is really similar to the transition I'm exploring from [your field]. I'd love to hear a bit about how that move went for you, if you're open to a short conversation."

Contacting someone in an industry you already know:

"Hi [Name], I spent [X years] in [industry, e.g. healthcare] and I'm exploring a move into sales at companies selling technology into that space. I saw you're at [Company] and would love to hear how your background in the industry has shaped your work there, if you have 15 minutes sometime."

How to run the conversation

Come prepared with two or three specific questions rather than a vague "tell me about your job." Good questions include what a typical week actually looks like, what surprised them most after joining, what they wish they'd known before starting, and what they think makes someone successful in the role. Let the conversation breathe; don't turn it into a rigid interview. At the end, thank them specifically for their time, and if it feels natural, ask if there's anyone else they'd suggest you talk to. Don't ask them directly for a referral or a job in this first conversation unless they offer; let the relationship develop naturally, and if there's a real fit later, it will usually come up on its own.

Building relationships over time

A single conversation rarely leads directly to a job, and that's fine; the goal is to build a small, genuine network over weeks and months, not to extract an immediate outcome from one message. Follow up occasionally, share something relevant you've learned, congratulate people on posts about promotions or new roles, and generally stay a real, present connection rather than someone who reached out once and disappeared. When you do eventually apply somewhere one of your contacts works, it's entirely reasonable to mention the earlier conversation and ask if they'd be willing to refer you, since by that point you've built enough of a relationship for that ask to feel natural rather than transactional.

Chapter 15: Applying for Jobs

Avoid applying blindly

It's tempting, especially early in a job search, to apply to as many postings as possible as quickly as possible. This usually produces a low response rate and can leave you exhausted without much to show for it. A more effective approach treats each application, at least for companies on your actual target list, as worth a few extra minutes of preparation.

Study the job description

Read the full posting carefully, not just the title. Note the specific responsibilities, the specific qualifications, and any language that hints at the company's actual priorities, for instance whether the posting emphasizes outbound cold calling heavily, which tells you something concrete about the day-to-day work, versus emphasizing inbound lead follow-up.

Research the company

Spend ten to fifteen minutes on the company's website, recent news, and if possible, its product, before applying. This preparation pays off twice: it helps you write a more specific, credible application, and it means you're not starting from zero if you get an interview.

Tailor your resume without rewriting it from scratch every time

Keep one strong, well-built base resume, built using the guidance in Chapter 10, and adjust it modestly for each application: reorder or emphasize the bullets most relevant to that specific posting, and make sure your summary line reflects the specific role and, if relevant, industry alignment. This is a matter of minutes, not hours, once your base resume is solid.

Prepare for application questions

Many applications include a few short written questions beyond the resume itself, commonly some version of "why this role" or "why this company." Prepare genuine, specific answers in advance rather than improvising them under time pressure while filling out a form; a generic answer here is an easy way to get filtered out before you ever reach a human.

Follow up after applying

A short, polite follow-up message a week or so after applying, ideally to a specific person if you can identify one through LinkedIn, restating your interest and adding one new, relevant detail, is a reasonable and often effective practice. It shouldn't be aggressive or repeated excessively; one thoughtful follow-up is usually enough.

Balance volume with quality

There's a real tension in a job search between applying broadly enough to generate opportunities and applying carefully enough that each application actually has a real shot. A reasonable approach is to maintain two tracks: a shorter list of genuinely high-priority target companies, researched and tailored carefully, and a broader list of reasonable-fit roles where you apply more efficiently with your base resume and a shorter research pass. Both tracks matter; the first one tends to produce your best outcomes, but the second keeps your overall pipeline of opportunities healthy while you work the first.

Chapter 16: Preparing for Tech Sales Interviews

Common interview questions

Why sales? This question is looking for genuine, specific motivation, not a generic answer about liking to talk to people. A strong answer connects a real observation about yourself, something you noticed you enjoyed or were good at in a previous role, to what you understand about the actual work of sales, drawing on the honest picture built in Chapters 2 and 8 of this guide.

Why technology? This is looking for genuine curiosity about the industry, not just an interest in the paycheck. A strong answer references something specific: a technology category you find interesting, a product you've used and admired, or a connection to your own prior industry background.

Why this company? This question rewards preparation directly. A generic answer ("I've heard great things") is instantly forgettable. A specific answer, referencing something concrete about the product, the market, recent news, or the role itself, shows you've actually done the research covered in Chapter 15.

Why should we hire you? This is your chance to directly connect your background to the role, using the same translation work covered in Chapter 10. Be specific and concrete rather than generally enthusiastic.

How do you handle rejection? Given how much rejection is built into the SDR role, interviewers take this question seriously. A strong answer is honest and specific: describe a real instance of facing rejection or a setback, what you did with it, and what you learned, rather than claiming rejection doesn't bother you at all, which tends to read as inauthentic.

Behavioral questions ("tell me about a time you..."), covering a difficult situation, persuading someone, learning something quickly, or working toward a goal, are extremely common in sales interviews. These are best answered using a simple structure: briefly set up the situation, describe the specific action you took, and clearly state the outcome, ideally with a number or concrete result if you have one.

Answering honestly as a career changer

You don't need a sales example for every behavioral question. If you're asked about persuading someone, a story about convincing a classroom of skeptical students to engage with a difficult topic, or convincing a manager to approve a new process, is entirely legitimate and often more memorable than a generic sales anecdote from a candidate reciting rehearsed material. The goal is a true, specific story that demonstrates the underlying skill the question is

really asking about, not a fabricated sales story that sounds impressive but isn't actually yours.

Sales role plays

Many tech sales interviews, especially for SDR and AE roles, include a role play: you're asked to make a mock cold call, run a mock discovery conversation, or sometimes deliver a mock pitch or demo, usually with the interviewer playing the prospect.

What interviewers look for during a role play

Interviewers generally aren't grading you on a polished, flawless performance; they're looking for whether you can stay composed under a bit of pressure, whether you ask real questions instead of just talking at the "prospect," whether you listen to and adapt to what the interviewer says rather than running a fixed script regardless of the response, and whether you handle an objection calmly rather than getting flustered or defensive.

A simple structure for handling a role play

If asked to run a mock cold call or discovery conversation, a reasonable structure looks like this: open by briefly stating who you are and why you're calling, in a natural, non-scripted way; ask an open-ended question to understand the "prospect's" situation; listen to the answer and ask a genuine follow-up question based on what they actually said, rather than moving straight to your next planned line; if you hear an objection, acknowledge it directly and ask a clarifying question rather than immediately trying to argue past it; and close by proposing a clear, low-pressure next step, like a follow-up meeting. This structure works because it demonstrates real listening and adaptability rather than a memorized script, which is exactly what most interviewers are actually evaluating.

Chapter 17: Cold Calling for Beginners

Cold calling makes almost everyone nervous the first time, including people who go on to be genuinely good at it. This chapter breaks down why companies still use it, what actually happens on a good call, and how to handle it without a script that falls apart the second the conversation doesn't go as planned.

Why companies still cold call

Despite predictions over the years that cold calling would disappear, phone conversation remains one of the fastest ways to have a real, two-way conversation with a prospect, get immediate feedback, and move a relationship forward in a way that email, which is easy to ignore, often can't match. It's not the only channel that works, and most companies combine it with email and LinkedIn as described in Chapter 6, but it remains a core part of the SDR toolkit at most B2B companies.

What a cold call actually is

A cold call is a phone call to someone who hasn't previously engaged with you or expressed interest. The goal of the opening isn't to explain your entire product in the first thirty seconds; it's to earn enough attention and permission to have a real, short conversation. Trying to cram a full pitch into the opening is one of the most common mistakes new callers make, and it almost always backfires, because it signals to the prospect that you're reading a script at them rather than talking with them.

Openings

A permission-based opening acknowledges directly that you're calling unannounced and asks for a small amount of the person's time, which tends to land better than pretending the call isn't an interruption. Something like: "Hi [Name], this is [Your Name] from [Company], I know this is out of the blue, do you have thirty seconds?" This respects the prospect's time and, somewhat counterintuitively, tends to get a more positive response than a more aggressive or evasive opening.

Reason for calling

Once you have permission to continue, state a clear, specific, brief reason for the call, ideally connected to something relevant about their company or role, rather than a generic pitch. The goal here is relevance, showing the prospect quickly that this isn't a random call, without over-explaining.

Questions

After your brief reason for calling, move to a genuine question about their situation, rather than continuing to talk about your product. This shifts the call from a monologue to a

conversation, which is both more effective and considerably less exhausting to run over and over throughout a day.

Listening and adapting

The single biggest difference between a rep working from a rigid script and a rep who sounds like a real, competent professional is whether they actually listen to the answer and adjust, or just move on to the next scripted line regardless of what the prospect said. Treat your talking points as a flexible guide, not a script to recite word for word.

Handling objections

Common objections in cold calling include "I'm not interested," "we already have a solution for that," "send me some information," and "I don't have time right now." None of these should be treated as combat to be won through clever rebuttals. A calmer, more effective approach acknowledges the objection directly, then asks a brief clarifying question rather than immediately arguing.

For "I'm not interested": "Totally fair, most people are, when they don't know why I'm calling. Can I take fifteen seconds to explain, and if it's still not relevant, I'll let you go?"

For "we already have a solution": "That's helpful to know, out of curiosity, how's that working for you so far?" This often opens up a real conversation about gaps or frustrations with the current solution, rather than ending the call.

For "send me some information": "Happy to. Can I ask one quick question first, so what I send is actually relevant to you rather than something generic?"

For "I don't have time right now": "Understood, when would be a better time to grab five minutes?"

These aren't magic words that guarantee a positive response; plenty of prospects will still decline, and that's a normal, expected part of the job, not a sign you did something wrong. What these responses do is keep the conversation calm, respectful, and genuinely open to the prospect's actual situation, rather than defensive or pushy, which tends to produce better results over time even if any single call doesn't convert.

Voicemail

Keep voicemails short, roughly fifteen to twenty seconds, state your name, company, and a brief, specific reason for calling, and mention that you'll follow up by email. Don't try to deliver a full pitch in a voicemail; almost no one calls back based on a voicemail pitch alone, and a long, dense message is more likely to be deleted before it finishes playing.

Follow-up

As covered in Chapter 8, most connections happen after multiple attempts, not the first one. Persistence across calls, email, and LinkedIn, spaced out reasonably rather than crammed into

a single day, is a normal and expected part of prospecting, not a sign of desperation.

Chapter 18: Writing Better Sales Emails

The basic purpose of a cold email

A cold email's job usually isn't to close a deal in one message; it's to earn a reply, a meeting, or at minimum, enough interest that the prospect doesn't immediately delete it. Keeping that narrow, realistic goal in mind changes how you write.

Subject lines

Short, specific, and low-hype subject lines tend to outperform vague or salesy ones. Something referencing a specific detail about the prospect's company or situation performs better than a generic phrase like "Quick question" or "Following up," both of which have been so overused that many inboxes have started filtering or ignoring them by pattern.

Opening lines

Avoid opening with a line about yourself or your company; open instead with something relevant to the prospect. A reference to something specific and recent about their business, role, or industry signals immediately that this isn't a mass, generic email.

Personalization

Real personalization means something specific enough that the email couldn't have been sent, word for word, to a hundred other people. This doesn't require hours of research per email; even one specific, genuine detail, referencing their company's recent news, their specific role's likely priorities, or something relevant about their industry, makes a real difference in response rates.

Business problems and relevance

The core of the email should connect a specific, plausible problem to the prospect's situation, not a list of your product's features. Prospects respond to relevance, not to a comprehensive feature list; a short email that clearly understands their likely problem outperforms a long one that describes everything the product does.

Questions

Ending with a genuine question, rather than a flat statement, invites a response and signals real curiosity about the prospect's situation rather than a one-way pitch.

Calls to action

Keep the ask small and specific. "Worth a quick fifteen-minute call this week?" is easier to say yes to than a vague "Let me know if you're interested," which puts all the work of figuring out

next steps back on the prospect.

Length

Shorter is almost always better. A cold email that can be read in under fifteen seconds respects the prospect's time and is far more likely to actually get read all the way through than a long one, no matter how well-written the long version is.

An example

Here's a short example that pulls the above elements together, for a hypothetical HR technology product reaching out to an HR leader at a mid-sized company:

"Subject: Onboarding at [Company]

Hi [Name], noticed [Company] has been growing its team pretty quickly this year, congrats. Curious how onboarding is holding up as headcount scales, that's usually where things start to strain first. We've helped a few similarly-sized teams cut onboarding time significantly without adding headcount to HR. Worth a quick fifteen minutes this week to see if it's relevant for you?"

Notice what this does: it references something specific and plausible about the company, names a likely problem without assuming too much, briefly and credibly states relevant value, and closes with a small, specific ask.

Follow-up emails

Most cold email sequences involve several follow-ups, not just one message. Each follow-up should add something, a new angle, a relevant piece of content, a slightly different question, rather than simply repeating "just following up," which adds no new value and is easy to ignore.

Why generic mass emails underperform

A generic email that could be sent unchanged to a thousand different people reads as exactly that to the person receiving it, and modern prospects have gotten quite good at recognizing and instantly disregarding this pattern. The volume-over-quality approach was more effective years ago, before inboxes were as flooded with generic outreach as they are now; today, a smaller number of genuinely relevant, specific emails generally outperforms a much larger number of generic ones.

Personalizing without spending excessive time on every email

You don't need to spend twenty minutes researching every single prospect. A reasonable middle ground is to build a handful of strong, semi-templated frameworks, each built around a specific, common scenario your ICP faces, and then spend a small amount of time per prospect swapping in one or two genuinely specific details. This gets you most of the benefit of full

personalization at a fraction of the time cost, and it's roughly how most experienced SDRs actually operate day to day.

Chapter 19: Understanding Compensation

Sales compensation is structured differently from most other professional jobs, and understanding the mechanics before you're evaluating an offer will help you ask sharper questions and avoid unpleasant surprises.

The core components

Base salary is the fixed portion of your pay, paid regardless of performance. Commission is variable pay tied directly to results, typically a percentage of the deals you close or, for SDRs, tied to meetings booked or opportunities generated. On-Target Earnings, or OTE, is the combined total, base plus commission, that you'd earn if you hit exactly 100% of your assigned target. This is the number most commonly advertised in job postings, and it's important to understand that it's a target, not a guarantee; industry-wide data consistently shows that a meaningful share of sales reps, sometimes under half in a given period, hit their full quota in any given year, so treat an advertised OTE as an optimistic ceiling rather than an expected paycheck.

Quota is the specific, measurable target you're expected to hit, expressed differently depending on the role: a dollar amount of closed revenue for an AE, or a number of qualified meetings or opportunities for an SDR. Accelerators are increased commission rates that kick in once you exceed 100% of quota, meaning your marginal earnings on deals beyond quota can be significantly higher than your earnings on deals within it, which is part of why strong performers in uncapped commission plans can substantially outearn their stated OTE. Draws are a mechanism, mostly used during ramp periods, where a company advances you a set amount against future commission, guaranteeing a minimum paycheck even before you've closed enough to earn it outright; this is more common at companies with longer sales cycles, where it would otherwise take months before a new rep sees any commission at all.

Ramp period refers to the initial stretch, commonly three to six months, during which a new rep is learning the role, the product, and the market, and isn't expected to be hitting full quota yet. Many companies build a reduced or graduated quota into the ramp period specifically to account for this learning curve.

Benefits cover the usual categories: health insurance, retirement contributions, paid time off, and so on, and should be weighed alongside cash compensation when comparing offers.

Equity refers to ownership stakes, most commonly stock options at private companies, that can become valuable if the company is eventually acquired or goes public, but carry real risk and should not be treated as guaranteed value, particularly at early-stage companies.

Current compensation ranges, as a general reference

Compensation varies enormously by role, company stage, deal size, and location, so treat the following as a general orientation rather than a promise about what you personally will earn.

As of 2026, entry-level SDR roles in the US commonly show base salaries in roughly the \$50,000 to \$65,000 range with OTE in the \$65,000 to \$95,000 range, and more senior or specialized SDR roles, particularly at well-funded AI companies competing hard for talent, sometimes reaching higher. Account Executive compensation varies far more widely depending on segment: SMB-focused AE roles often show OTE in a broadly similar range to senior SDR roles, while mid-market AE OTE commonly runs somewhat higher, and enterprise AE OTE at growth-stage SaaS companies can run considerably higher still, sometimes into the low hundreds of thousands of dollars or more for experienced reps carrying large quotas at larger, well-resourced companies. Pay structures also vary by role: SDR compensation is commonly weighted more heavily toward base salary (a 70% base, 30% variable split is typical), while AE compensation is typically closer to an even split between base and variable, or even weighted more toward variable at some companies, since AEs carry more direct responsibility for closing revenue.

These figures move over time and vary by region and cost of living, so treat any specific number you read, including the ones above, as a snapshot rather than a permanent fact, and always verify current figures for a specific role and company rather than relying solely on general industry averages when you're evaluating a real offer.

Questions to ask before accepting an offer

Before accepting a sales role, it's reasonable and expected to ask direct questions about compensation mechanics. Useful questions include:

- What's the specific quota, and how is it measured?
- What percentage of reps on the team hit quota in the last year?
- What does the ramp period look like, and is there a reduced quota or a draw during it?
- What's the average attainment across the team, not just the top performer?
- Where do leads and pipeline typically come from: mostly inbound, mostly outbound, or a mix?
- What territory or account list would I actually be working?
- What does the promotion path and timeline typically look like for someone performing well in this role?
- How exactly is the compensation plan structured: base-to-variable split, accelerators, caps if any?

Asking these questions directly in an interview is not considered rude or presumptuous; experienced sales candidates ask exactly these questions, and a company that reacts poorly to reasonable, direct questions about compensation is itself a useful piece of information about how that company operates.

Chapter 20: Your First 90 Days

The first three months in a new sales role set the tone for everything that follows. This chapter breaks down what to focus on, broken into rough phases, so you can learn without becoming overwhelmed.

Days 1 through 30: absorb before you produce

The first month is mostly about building a foundation, not generating results yet. Focus on genuinely learning the product: what it does, what problems it solves, and ideally, how to explain it in plain language to someone who's never heard of it. Focus on learning your customer: who the ICP is, what their common pain points are, and what a typical buyer actually cares about. Focus on learning the industry you're now selling into, if it's new to you, using the research habits described in Chapter 9. Learn the CRM and any other tools your team uses, and start building the habit of logging your activity accurately from day one, since bad habits formed early are harder to break later. Start listening to calls, your own once you begin making them, and ideally recordings of stronger, more experienced reps, to absorb how a real conversation actually sounds. Most companies expect a genuinely reduced level of independent output during this period, so don't panic if your numbers are low in week two; that's normal and expected.

Days 31 through 60: start producing, expect roughness

By the second month, you should be actively prospecting, making calls, sending emails, and beginning to book meetings, even if the volume and quality are still building. This is also the period to actively seek feedback: ask your manager to listen to some of your calls and give specific, direct feedback, and take detailed notes when they do, since repeated, specific coaching is how the roughest edges of a new rep's approach get smoothed out fastest. Start paying closer attention to your own metrics, not just whether you're hitting a number, but which parts of your process are working and which aren't, so you can start making deliberate adjustments rather than just repeating the same approach regardless of results.

Days 61 through 90: build consistency

By the third month, the goal shifts toward consistency: hitting your activity targets reliably, not just in occasional strong days, and starting to see early signs of real pipeline results, meetings that are actually turning into qualified opportunities. This is also a good period to start deepening relationships with coworkers beyond your immediate team, particularly with AEs you support, since a strong working relationship with the AEs you feed pipeline to makes the job considerably smoother and gives you a closer view into what a full sales cycle looks like, which will help you when it's your turn to move into that role.

Learning without becoming overwhelmed

A new sales role throws a lot at you at once: product knowledge, industry knowledge, tools, process, and the emotional weight of daily rejection, all at the same time. It's normal to feel behind in the first few weeks. The most effective way through this is to focus on one or two specific things to improve at a time rather than trying to fix everything at once, to actively use the feedback your manager gives you rather than treating coaching sessions as a formality, and to remember that ramp periods exist specifically because companies expect this learning curve, not because you're falling short of some invisible standard. Consistent, honest effort over ninety days pays off far more than a fast, flashy start that fades.

Chapter 21: Moving from BDR to AE

The move from SDR or BDR into an Account Executive role is the most common and most anticipated promotion in tech sales, and it's worth understanding both how it typically works and what new skills it actually demands, so you can start preparing for it well before it happens.

How the promotion usually works

Most companies look for a consistent track record of hitting or exceeding quota over a meaningful stretch, commonly somewhere in the twelve-to-twenty-four month range, though this varies by company and by how quickly a given rep demonstrates readiness. Some companies have a formal, documented promotion process with clear criteria; others handle it more informally, based on a manager's judgment and advocacy. As covered in Chapter 12, it's worth understanding, ideally before you even take an SDR job, how structured a given company's promotion path actually is.

What an AE needs beyond SDR skills

The SDR role is built around generating and qualifying interest. The AE role is built around running a full, complex sales process to close, which requires several additional skills.

Discovery at depth. SDR-level qualification is relatively surface-level; AE-level discovery requires a much deeper understanding of a prospect's business, priorities, and internal dynamics, closer to the level described in Chapter 6.

Demonstrations. AEs are typically responsible for either delivering or closely coordinating product demonstrations, which requires a much stronger command of the product than an SDR typically needs.

Stakeholder management. As covered throughout this guide, AEs are responsible for navigating multiple stakeholders across an entire deal, not just the first person they talk to.

Business case development. AEs need to be able to help a prospect build the internal financial and strategic case for the purchase, which requires real comfort with numbers and business reasoning.

Negotiation. AEs directly negotiate price, terms, and contract details, a skill that SDRs rarely practice directly.

Pipeline management and forecasting. AEs are responsible for managing a full portfolio of deals at various stages simultaneously and forecasting, with reasonable accuracy, what's likely to close and when, a skill that requires real discipline and honest self-assessment.

Closing. The actual skill of recognizing when a deal is ready to close and guiding it firmly, but appropriately, to a signature.

How to start building these skills before the promotion

A strong SDR doesn't wait until promotion to start building AE-adjacent skills. Ask your manager or the AEs you support if you can sit in on discovery calls and demos as an observer. Pay close attention to how experienced AEs handle objections and manage multiple stakeholders. Ask questions about how deals you've sourced eventually closed or fell through, and why. Read up on your company's specific sales methodology in more depth than you strictly need to as an SDR. None of this replaces the actual experience of running full deals yourself, but it meaningfully shortens the learning curve once you make the move, and it also signals real initiative to the managers who'll be deciding whether you're ready.

Chapter 22: Other Career Paths

B2B tech sales experience doesn't lock you into a single trajectory. It opens doors into several different directions, and it's worth understanding what those look like, both because it can shape which skills you prioritize building early and because it's genuinely useful to know your options aren't limited to "climb the same ladder forever or leave."

Account Executive and enterprise sales. The most direct path, described in Chapter 21: continuing to grow as an individual contributor, eventually moving into larger, more complex enterprise deals, which reward deeper stakeholder management and negotiation skill.

Account Management. A move toward managing and growing existing customer relationships rather than continually closing new ones, which rewards relationship depth and patience over pure hunting instinct.

Customer Success. A related but distinct path focused specifically on customer outcomes and retention, which suits people who get real satisfaction from helping a customer succeed over time rather than the thrill of closing a new deal.

Partnerships. Moving into managing relationships with other companies that resell, integrate with, or refer business, which rewards relationship-building skill applied at a business-to-business level rather than directly to end customers.

Sales Engineering. For people who've built genuine technical depth along the way, a move into a more technical, product-focused role that blends sales and engineering skill.

Sales leadership. Moving from individual contributor into managing a team, which requires an entirely different skill set centered on coaching, hiring, and team-level forecasting rather than individual selling.

Sales Operations and Revenue Operations. For people who discover they enjoy the systems, data, and process side of the business more than direct selling, a move into Sales Ops or RevOps, described in Chapter 2, which draws on the organizational and analytical skills built through disciplined pipeline and CRM management.

Recruiting. Some experienced sales professionals move into recruiting, particularly technical or sales recruiting, since the underlying skills of sourcing, qualifying, and closing candidates closely mirror sales work, as discussed in Chapter 3.

Consulting. Deep expertise in a specific industry or sales motion, built over years in a sales role, can translate into consulting work helping other companies build or improve their own sales organizations.

Entrepreneurship. Many people who eventually start their own companies point to their time in B2B sales as foundational, since it directly teaches how to sell an unproven product to a

skeptical audience, build a pipeline from nothing, and manage a long, uncertain process toward an outcome, all skills a founder needs on day one.

Each of these paths draws differently on the skills covered throughout this guide, and it's worth paying attention, over your first few years in the industry, to which parts of the job genuinely energize you and which parts feel like a grind. That honest self-assessment is usually a better guide to your next move than simply following whichever path seems most prestigious from the outside.

Chapter 23: Common Mistakes Career Changers Make

Applying without understanding the role. Applying to a generic "tech sales" posting without reading closely what the actual day-to-day work involves leads to mismatched expectations and, often, early frustration or burnout. Do the reading described in Chapters 2 and 8 before you apply.

Thinking every sales job is the same. As covered throughout this guide, an SMB SDR role and an enterprise AE role are meaningfully different jobs. Treating "sales" as a single, undifferentiated category leads to poor-fit applications and poor-fit acceptances.

Focusing only on salary. The highest advertised OTE isn't automatically the best opportunity, particularly if it comes with an unrealistic quota, poor lead flow, or weak training, as covered in Chapter 12. Evaluate the whole picture, not just the headline number.

Pretending to have experience you don't have. Overstating sales experience in an interview is easy to catch and damages credibility immediately once it's noticed. The honest positioning described in Chapters 10 and 11 is consistently the stronger approach.

Ignoring transferable skills. The opposite mistake: assuming your prior background is irrelevant and therefore failing to make the case for it clearly on your resume or in an interview. Chapter 3's entire purpose is to prevent this mistake.

Applying only to famous technology companies. As covered in Chapter 12, a recognizable name isn't automatically the best training ground or the most realistic path in. Limiting your search to household names dramatically narrows your options for no strong reason.

Not learning basic sales language. Walking into an interview without understanding basic terms like pipeline, quota, or ACV signals a lack of real preparation. Chapters 1, 5, and 9 exist specifically to close this gap.

Avoiding cold calling. Some candidates specifically avoid SDR roles because of the cold calling component, narrowing their options considerably and, often, avoiding a skill that would serve them well even outside of a calling-heavy role. Chapter 17 is meant to make this feel more approachable, not to pretend it isn't a real challenge.

Sending generic networking messages. A copy-paste connection request with no personal detail is easy to ignore and rarely leads anywhere. The specific examples in Chapter 14 exist to help you avoid this.

Giving up after rejection. Both in the job search itself and later in the actual sales role, giving up after a small number of setbacks is one of the most common reasons people don't succeed, not because the setbacks were unusually severe, but because persistence past the early,

hardest stretch is where most of the real progress happens.

Expecting a job immediately. A realistic tech sales job search commonly takes anywhere from several weeks to a few months of sustained, genuine effort, particularly for a career changer without existing industry connections. Expecting an offer within the first week or two of casual searching sets up unnecessary disappointment; treat the process, described across Chapters 13 through 16, as a sustained project rather than a quick errand.

Chapter 24: Building Your Own Entry Plan

Reading advice is one thing; building a specific plan for your own situation is another. This chapter walks through several example paths to show you how the pieces of this guide come together for a real person, and then invites you to build your own version.

Example: a teacher moving into EdTech sales

Existing strengths: presenting to groups, explaining complex material clearly, managing multiple stakeholders (students, parents, administrators) at once, patience, and structured planning toward a defined outcome. Industry advantage: direct, credible understanding of how schools and districts actually make purchasing decisions and what teachers and administrators genuinely struggle with day to day. Skills to learn: outbound prospecting mechanics, CRM discipline, and comfort with a faster, less structured pace than a school calendar typically involves. Roles to target: SDR or BDR roles at EdTech companies, or, at smaller EdTech companies specifically, a direct AE role given the strength of the industry-specific credibility. What to research: the specific EdTech company's product, its target buyer (district-level administrators versus individual teachers, which differs company to company), and recent trends in education budgets and procurement.

Example: a marketer moving into MarTech sales

Existing strengths: strong writing, understanding of audience and messaging, comfort with data and campaign metrics. Industry advantage: fluency in the exact vocabulary and daily frustrations of the buyer, since the buyer's job closely resembles the seller's own former job. Skills to learn: live, real-time persuasion and objection handling, since marketing work tends to be more asynchronous and written than sales conversation. Roles to target: SDR roles at MarTech companies, with a faster-than-average path to AE given direct buyer fluency. What to research: which specific marketing sub-function the product serves (email, analytics, customer data, advertising), since MarTech is a broad category and specificity in your outreach and interviews will set you apart.

Example: a customer service professional moving into SaaS sales

Existing strengths: patience, listening for the real problem underneath what's initially said, staying composed under pressure, clear explanation. Industry advantage: less industry-specific, more broadly transferable, since customer service exists across nearly every sector; consider whether your specific customer service background (which industry, which type of product) points toward a relevant sector from Chapter 4. Skills to learn: proactive, cold outreach, since most customer service work is reactive rather than proactive; this is usually the single biggest adjustment for this background. Roles to target: general SDR or BDR roles at horizontal SaaS companies are a broadly reasonable starting point given this background's flexibility. What to research: the specific product category, and honestly assess whether you're

more drawn to a fast-paced, high-volume environment or a more relationship-driven one, since your customer service background likely gives you a real preference here worth listening to.

Example: a healthcare professional moving into HealthTech or MedTech sales

Existing strengths: composure under pressure, comfort with high-stakes conversations, deep credibility with clinical and administrative buyers. Industry advantage: substantial and hard to replicate; healthcare buyers are often skeptical of vendors without genuine clinical or operational understanding, and this background addresses that skepticism directly. Skills to learn: general sales process discipline, prospecting mechanics, and comfort with a commission-based compensation structure if coming from a salaried clinical role. Roles to target: given the strength of the domain credibility, a direct AE role, particularly at a smaller HealthTech company, is a realistic target, not just an SDR role; it's worth applying to both and letting the market tell you which lands. What to research: the regulatory environment relevant to the specific product, since HealthTech and MedTech sales cycles are often shaped heavily by compliance and clinical validation requirements.

Example: an IT professional moving into infrastructure or cybersecurity sales

Existing strengths: technical credibility, ability to explain complex technical concepts to less technical stakeholders, hands-on understanding of how software integrates into existing systems. Industry advantage: strong; buyers in this space, often other technical professionals, respond well to a rep who clearly understands the technical substance rather than reciting a marketing pitch. Skills to learn: the commercial and relationship-building side of sales, since IT and technical support roles are typically less focused on persuasion and negotiation than on problem-solving. Roles to target: Sales Engineering is a particularly strong fit given the technical background, but a direct SDR or AE role at a cybersecurity or infrastructure company is also realistic, especially one that explicitly values technical credibility in its hiring. What to research: the specific technical category (network security, identity management, cloud infrastructure, and so on) since depth in a specific area will differentiate you more than general IT experience alone.

Build your own plan

Using the examples above as a model, work through the same four questions for your own situation: What are your existing strengths, drawn honestly from Chapter 3? Is there a specific industry advantage available to you, drawn from Chapter 4? What specific skills do you genuinely need to build, drawn from Chapter 7? And what roles and companies should you realistically target first, drawn from Chapters 2 and 12? Write the answers down. A plan you've actually written out, even briefly, is considerably more likely to produce consistent action than a general intention to "look into tech sales sometime."

What to Do Next

You now have a genuinely thorough picture of what B2B tech sales is, how the industry works, what the jobs actually involve, and how someone coming from outside the field can realistically get in. Here's a clear sequence for turning that understanding into action.

Choose one or two technology sectors to research more deeply. Use Chapter 4 as your starting point, and give real weight to any sector connected to your existing background, as covered in Chapter 3.

Learn the basic roles cold. Make sure you can explain the difference between an SDR, an AE, a CSM, and the other roles from Chapter 2 without hesitation, since this comes up constantly in early conversations and interviews.

Identify your own transferable skills specifically. Don't leave this vague. Write down the specific skills from your background, using Chapter 3 as a guide, and the specific evidence you have for each one.

Review real job descriptions. Read ten to fifteen actual postings for SDR or entry-level AE roles, paying attention to patterns in language and requirements, as covered in Chapter 15.

Update your resume. Apply the translation work from Chapter 10 to your actual work history, focusing on outcomes and evidence rather than duties.

Update your LinkedIn profile. Apply the guidance from Chapter 11, making your direction and your case for it clear and honest.

Start learning sales fundamentals in more depth. Revisit Chapters 1, 5, 6, and 9 as needed, and start following industry conversation as described in Chapter 9.

Talk to people already doing the work. Use the specific scripts and approach from Chapter 14 to start building a small, genuine network in your target sector.

Build a target company list. Using the evaluation criteria from Chapter 12, identify a focused list of companies worth prioritizing, alongside a broader list for volume applications.

Apply consistently, not sporadically. Treat the search as a sustained project, using the tracking and pacing guidance from Chapter 13.

Prepare specifically for interviews. Practice the behavioral questions and role-play structure from Chapter 16 before you're actually in front of an interviewer.

Keep learning once you're in the door. The first 90 days, described in Chapter 20, set the tone for your whole career in the industry; approach them with real intention.

If you're still genuinely unsure which direction fits you best, that's a normal place to be, and it's worth spending real time on before you commit to a specific path. Some people find it

useful to work through a structured self-assessment, whether that's a formal career discovery tool like SkillMap Pro or simply a disciplined version of the exercise in Chapter 24, to get a clearer, more objective picture of how their existing skills and interests map onto the options in front of them. Tools like that are a reasonable input, not a replacement for the honest self-reflection and real conversations with people in the field that ultimately make the difference.

B2B tech sales isn't a shortcut, and nobody can promise you a specific salary, a fast promotion, or guaranteed success; those outcomes depend on the company you join, the effort you put in, and, honestly, some amount of circumstance outside your control. What this guide can promise is that the path in is real, it's more open to people from unconventional backgrounds than most other well-paying professional fields, and the work of getting ready for it, understanding the industry, translating your experience, building your network, and preparing seriously for interviews, is entirely within your control. Start with the first step above, and keep moving.

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