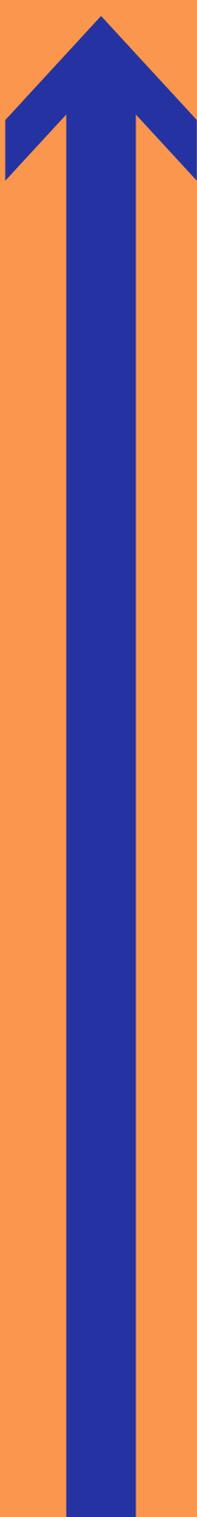




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FOUNDER'S GUIDE TO SDR MANAGEMENT



FREE TEMPLATE



SDR Management Guide for Founders

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Goal of Supporting SDRs

1. Drive Revenue
2. Get the Most Out of Individual Reps (Team)
3. Developing Sales Reps for Future Growth

Using Data as a Guide

1. Inputs (structure & prioritize)
 - a. Activities per SDR per month
 - b. Percentage of first emails personalized
 - c. AE hand-off compliance metrics
 - d. Average contacts engaged per account per month
 - e. Average accounts engaged per SDR per month
2. KPI's (calls, touches, follow ups)
 - a. No-show rate
 - b. Disqualification rate after initial meetings held
 - c. Activities per qualified opportunity generated
3. Outputs (deals passed to AE, deals closed)
 - a. Results SDR ROI (or its reciprocal, SDR cost of sale)
 - b. SDR-sourced ARR
 - c. SDR-sourced pipeline
 - d. ACV of SDR -sourced wins
 - e. Win rate for SDR-sourced opportunities
 - f. Average qualified opportunities per SDR per month

Sales Meeting Tips

Be present

- When meeting, take the time to prep like it's the most important prospect

Celebrate

- When someone does something great, tell them and share it

Be patient

- Trust your process, trust your decisions

Learn

- From your reps, listen, ask questions

Create Culture

- Always be thinking about what sales culture you're creating through your meetings

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Create Alignment

- Red (stop), yellow (pause) , green (continue)

Over Communicate

- Your vision, passion, sales goals and sales priorities

Onboarding - Customer centric onboarding

- Implement buddy program
- Ramping period is approximately 3 months
 - Ramp metrics, ramp expectations, ramp outputs
- Create onboarding tasks
 - Assign tasks to SDR and define if it is a
 - Meeting: meet with team member, network, customer
 - Assignment: assign to do's
 - Test/Certification: certify SDR's on specific skills (discovery, demo, cold calls, personalized & relevant emails, etc...)
- Create protected time blocks for SDR's
 - Prospecting (50-75%)
 - Discovery (30-40%)
 - Other (10-15%)

Ongoing Trainings & Meetings

Sales Meetings

1. Weekly sales kick-offs
 - a. Celebrate wins
 - b. Learn from each other
 - c. Share MITs
 - d. Pipeline / forecasting review
 - e. Get help if you need it
 - f. What's holding us back
 - g. Call reviews (can be done outside of meetings)
 - h. Invite guest speakers, internal & external
2. Weekly one on ones
 - a. Celebrate wins
 - b. Learn from each other (what are prospects saying, share founder knowledge)
 - c. Align sales strategy and focus (if needed)



- d. How can we move deals forward
- 3. Weekly office hours
- 4. Monthly product updates
- 5. Monthly sales training

SDR Focus & Alignment

- 1. Most Important Activities for the Week
 - a. Every Monday morning: what are the 3 most important activities to do this week
 - b. Every Friday: reset, move forward tasks that aren't complete, add new tasks for next week
- 2. Forecasting
 - a. Every Monday: forecast outputs based on activity, review previous week