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# Your first 90 days as an SDR

This is your field guide to becoming an SDR; the goal is to provide you with a baseline understanding of all the different elements of the role. This doc cannot make you an expert or even good; that will come from making calls, writing emails, and searching LinkedIn for prospects.

Nobody starts off as a 'good SDR'; everyone sucked their first time through (especially me, I was terrible), so don't worry about being perfect. Instead, just focus on getting in and learning from the feedback for the first few weeks. With time, effort, and guidance from your team, you will get quite good at all these things.

This is a guide and not a holy book, so there will be exceptions, areas where people have different ways of doing things, and opposing opinions. We'll do our best to point out resources where you can learn from people that might disagree with what's in this guide. Just remember, there is no right and wrong when it comes to sales development; there is only what is working well right now for this particular SDR for this particular company.

A word of caution when reading posts on social media about mythical SDRs with amazing reply rates and meetings falling out of trees, please consider the product offering (\$ of sale, buyer type, and product positioning in the market).

We can show you the emails we used to book 300 meetings a month for a black car company when they launched their food delivery service, but I can guarantee they will not produce the same results for you. A good percentage of the performance of a revenue team depends on the context of the company they work for and their positioning in the market. This is not an excuse to blame your company or competition if you're not hitting your goal, but it is an important context to consider when comparing your results with what's working for someone else.

This doc is split into two parts; the first contains the overall table of contents of *all the things* you'll need to understand to be a successful SDR, and the second breaks *all of the things* into a week-by-week training plan for you. Think of the first half as the encyclopedia and the second half as the course lesson plan.

This information will feel a little overwhelming, and that's okay. You'll figure it out if you follow the lesson plan and put the work in. The most important piece to understand as an SDR is the customer you sell to. You can be excellent at everything else, but if you don't understand your customers' needs, then the rest won't help you.

This guide will cover the theory, skills you'll need to develop, and tools you'll need to learn to use.

# Theory

## Understanding the role of an SDR

Why does the SDR role exist? The book [Predictable Revenue](#) documents how Salesforce applied the SDR role to add \$100M in revenue in their first few years of operation. The core idea is that a company should specialize their sales roles into prospector, closer, and account manager to improve their sales team's revenue efficiency. There are two reasons why this was really impactful.

First, most full-cycle reps (reps that handle prospecting, closing, and account management) tend to have lumpy performance because they have to spread their focus between their three responsibilities. What this looked like in practice was a 2-month cycle where reps spent the first month focused on prospecting and the second month focused on closing. When the rep was focused on closing, they stopped prospecting, and their new pipeline dried up. Once they closed their current batch of deals, they had to spend another month prospecting to build it up again, and the cycle repeated itself.

Second, once a full-cycle rep has been in the role for over 18 months, they have a book of business (accounts) that they need to manage. This can range from managing renewals, upselling, or customer service. At this stage, they're likely making a decent amount of commission on renewals and upsells, and their desire or available time to prospect falls off dramatically.

The result is the mythical \$1M rep. One successful rep makes it through the 24-month journey and now manages \$1M in recurring revenue but doesn't have any time for prospecting or closing new business. If we guess that the average success rate of a new rep making it to mythical \$1M status is 25%, then you need to hire four reps for every \$1M in ARR your company needs. These stats aren't exact, but they help give you an idea of the direction.

Now, let's think about the people in this system. While some unicorn reps are excellent at every part of the cycle, most people struggle to manage their time between all three and generally have a particular part of the cycle that they excel at. Closing roles tend to have a larger revenue impact, so if one rep is significantly better than their peers, it will be profitable for the company to have that rep focus 100% of their time on closing while others (that are less experienced and cost less) focus on either prospecting or managing accounts.

Here's how the rough math on Specialization can play out.

### Old Model

|       | <i>Prospecting</i> | <i>Output</i> | <i>Closing</i> | <i>Output</i> | <i>Deal Size</i> | <i>Revenue</i> |
|-------|--------------------|---------------|----------------|---------------|------------------|----------------|
| Rep 1 | 70%                | 7             | 30%            | 2.1           | \$100,000        | \$210,00       |
| Rep 2 | 70%                | 7             | 20%            | 1.4           | \$100,000        | \$140,000      |
| Rep 3 | 70%                | 7             | 15%            | 1.05          | \$100,000        | \$105,000      |
|       |                    |               |                |               |                  | \$455,000      |

### New Model

|       | <i>Prospecting</i> | <i>Output</i> | <i>Closing</i> | <i>Output</i> | <i>Deal Size</i> | <i>Revenue</i> |
|-------|--------------------|---------------|----------------|---------------|------------------|----------------|
| Rep 1 |                    | 42            | 30%            | 12.6          | \$100,000        | \$1,260,000    |
| Rep 2 | 70%                | 21            |                |               |                  |                |
| Rep 3 | 70%                | 21            |                |               |                  |                |

In scenario 1, the company's revenue is \$455K from 3 full-cycle reps. In scenario 2, the company's revenue is \$63K with one prospector, one closer, and one account manager or \$1.26M with one closer and two dedicated prospectors.

This is a very long way to explain that Sales Development Reps exist because it is profitable for a company to specialize in their sales roles. Your role is to find companies that are likely to benefit from what your company can do, get someone from that company interested in a call, and make sure they show up to the meeting. Getting good at this takes 6 months, and if you consistently hit or exceed your quota for another 12-18 months, you'll be ready to start training for your next role.

# What Does an SDR Do?

An SDR aims to set up meetings between people who might need what your company sells and the team that closes deals for your company.

## What am I actually doing every day?

You'll do three main things daily: finding prospects to add to a sequence, writing emails, and cold calling. You'll find contacts to add to a sequence, call the people you've added to the sequence, and reply to your emails.

## How do you know who to reach out to?

The ['Know Your Customer/MarketFit'](#) section will help you understand who you'll be reaching out to and why people at those companies will benefit from speaking to you.

## How are you going to book a meeting?

There are two ways of booking a meeting, the phone or email. A meeting over the phone will happen when you reach someone over the phone, and they agree to a call with someone on your team. A meeting over email (or other written platform) will happen when someone interested in your offering replies, you ask them for a meeting, and they agree. Both of these happen every day for SDRs.

## Why would someone take a meeting with me and/or my sales rep?

People take meetings because they believe it will help them make progress on something that is important to them. This is absolutely critical to understand. You cannot convince someone to buy anything; you can only seek to understand if there is progress that they want to make that you might be able to help with.

## What does a good meeting look like?

There is a delicate balance of telling the prospect why you're calling, asking questions to see if there is an opportunity to help, and getting them excited about the call with your team member. Your job is similar to the role of a movie trailer; you need to share enough to get them excited to watch the movie without giving away so much of the plot that you spoil the movie.

## Homework

In a google sheet, work out the return on investment for your product (don't spend hours on it, the goal is a quick and dirty version).

Listen to The Predictable Revenue Podcast episode with [Lars Nilson](#) about where SDRs came from.

## So You Read Predictable Revenue

The book is 13 years old as we write this, the industry has grown wildly, and while the core ideas still stand, the tactics have changed. Let's take a minute and look at what pieces are still relevant and what needs to be updated.

### PR tl;dr

- Written by Aaron about building Salesforce's first outbound team.
- Specialize your sales roles - AEs shouldn't prospect. A dedicated prospector helps you get the most out of your best closers.
- Prospect using cold email - at the time PR was written, it was more efficient than the phone for booking meetings.
- Specific cold email tactic - the referral method = email someone above/adjacent to the person you want to reach and ask for a referral.
- Formula to Predictable Revenue: consistent top of funnel + consistent process = PR
- Nail Your Niche: In order to be effective, you need to understand your buyer and how you're uniquely positioned to help.

### What's still relevant?

- Specializing sales roles still works but not for everybody. For example, companies with really short sale cycles and low ACVs are likely to get a better result from having full-cycle reps. When you specialize sales roles, you add a layer between the customer and your AE. The concept of specializing means that adding this layer dramatically increases your AEs' efficiency. With smaller deal sizes and very short sale cycles, the juice is not worth the squeeze for specialization.
- Cold emailing has changed dramatically since the book came out. However, some teams are still getting solid results from email; it's not dead. That being said, most sales development teams implement a multi-touch sales development style involving phone, email, and social media.
- The referral method used to be the number one way to book meetings over email, but then everybody started using it. Now, people have forgotten the tactic, and we're seeing a resurgence in its effectiveness.
- Other email methods have emerged. One that has evolved here at PR is called the relevance method. This is where you go directly to the potential buyer and ask if solving the pain you solve is relevant to them right now. Another way to describe this is relationship-first prospecting. Your first goal is to establish a relationship with a prospect and ask if something like your solution is relevant to them.
- The formula for predictable revenue has stayed the same; just the tactics for booking meetings have changed. Process, training, and good management are still core elements of any predictable team.

Nailing your niche is more important than ever. With so many sales development reps, it's never been so hard to stand out in a crowd of emails. This makes identifying your niche essential.

[Email deliverability](#) wasn't on anyone's mind when the book was initially written. Now it is a little bit of a dark art. There are two factors in email deliverability: hygiene and engagement. Hygiene factors involve correctly setting up your domain and email systems (SPF, DKIM, DMARC) and ramping them correctly. Engagement factors measure how much prospects engage with your email (opens, reads, forwarding, replies, etc).

The tooling has changed dramatically. Back in the day, Yesware was one of the only tools available to facilitate a cold email outreach. Now there are hundreds, if not thousands. Building these systems to reinforce a strong process is now table stakes. Data is readily available but needs to be cleaned.

Sales and marketing are working together to co-engage on self-generated intent data. It could be from full-blown ABM campaigns, social engagement, or other demand-gen campaigns. This is an area where both teams working together can help get more out of both teams. Sales development now sits firmly right between sales and marketing and is seen as the pre-processor of marketing-generated intent data to turn it into qualified meetings for the sales team.



# SDR Mindset

Here are our guiding principles for Sales Development Reps to keep in mind.

## **SDRs exist to find unmet needs**

If everyone was perfectly capable of doing their job unassisted and knew everything they needed to know, you wouldn't be needed. Unfortunately, that isn't the case, and the world needs salespeople, especially SDRs, that are brave enough to persevere in the face of adversity to find people they might be able to help. Sometimes people will be rude, mean, or straight-up assholes, and even though it might feel like it's directed at you, it isn't. They're probably just hungry, tired, or need to poop.

## **Your job is a vital part of the economy**

You are the front lines of commerce. Without you, problems will remain unsolved, your future customers will stay stuck and frustrated, and your company will fail to make it to market. SDRs are central to keeping the B2B economy moving forward.

Your direct competition is the SDR at your competitors; never forget that they are working just as hard to book meetings with the same group of prospects that you're working with. If you want to crush them, you need to be better, more interesting, and more consistent than they are.

If you believe in your product, interrupting someone's day with your cold call is a kindness to them.

Think about it, most people answering will be rude and not interested, but you're still doing it. Why? Because the value of your product is so great that not finding everyone that needs your help is almost a crime.

## **The sales skills, attitude, and diligence you develop as an SDR will be vital to advancing your career, no matter what direction it takes**

SDRs that move into AE roles will be experts at the one thing that most AEs struggle with - prospecting and long-term follow-up. The AEs that we've seen advance from SDR roles are also better closers because they appreciate all the work that went into booking each meeting.

## **Everybody sucks at first**

But you'll get better. The SDR role is hard but not complicated, all you need to do is put the work in and be open to feedback from prospects, colleagues, and your manager.

## **Act like an entrepreneur**

Being in sales is as close as you can get to being an entrepreneur without starting your own company. As long as you hit your goals, you have the autonomy to hit them however you'd like,

and your performance dictates the size of your paycheck. With this freedom, risk, and upside your success is 100% on you. The best SDRs treat their quota like a business and own the results, good or bad.

### **Notes from my conversation with Jesui Ayala, our Implementation Manager here at PR and killer SDR manager**

This is a challenging role. Sometimes people will be rude, mean, or straight-up assholes. Someone else's reaction does not define you. If they were angry at your call, they were likely just angry about something else. Eventually, you'll get used to interacting with people in different emotional states, and it won't bother you as much.

It's easier to understand them when you think of people as grown babies who don't cry as frequently; we're all miserable when hungry, tired, or pooped in our pants. You need to understand your prospects and be empathetic enough to understand their day might be hectic but not too empathetic to feel like you're bothering them with your call.

At the end of the day, you're calling because you believe you can help them make progress on something they're struggling with that will improve their lives. When you start thinking about it this way and empathize with these poor people with unsolved problems, it's almost cruel if you don't call them to try to help. It's essential to reframe the role and see yourself as a superhero coming to rescue a future customer because it'll make everything else easier.

Everybody sucks at first, and your first few weeks will be rough; this is normal and temporary. You have to fail first to learn from your mistakes. My favorite Seinfeld quote is, *"Pain is just the sensation of experience entering the body."*

Roleplaying is the most awkward thing that will make you extraordinary (not talking about D&D here). Your first role-plays will be an uncomfortable experience, but listening to your calls, getting feedback, and role-playing it with a colleague is the fastest way to get good.

Let's assume that to nail a particular script; you need 1-2 hours of practice. If you were to try to learn the script on the fly (in front of live prospects), you would need 90 connects. Assuming 10 connects a day, that would be nine working days or two weeks. Scenario 1 involves an awkward 2-hour experience, but you immediately become proficient with your script. Scenario 2 involves being two weeks behind on hitting your quota. **The choice is yours.**

Have fun with the role. If you're the 7th person to cold call your prospect today, how will you stand out? Don't be afraid to be different, get creative, and think about an opener that will naaaail that call. Remember the golden rule of marketing, you can be better, or you can be different. Pick one and run with it.

## Resources

Blog post - [Are you setting your SDRs up for failure?](#)

Blog post - [Why SDRs should set their own targets](#)

Blog post - [How to develop a winning mindset](#)

# 7 Habits of Highly Successful SDRs

## 1. Organized

The most successful SDRs are the ones who are well organized, and being organized creates an efficient SDR who makes the job easier for themselves.

Consistent performance is easiest when a strong organizational system enables it. Placing blocks in your calendar that *you decide* to live by is the easiest way to hit your quota consistently. Check out the UnSchedule and Ryan's Buckets resources below for more info.

If you're context-switching and hopping from calls to research to emails to checking LinkedIn, you're losing time. Block your calendar and get all your similar tasks done at once. Filter your call tasks so you're calling a time zone at the appropriate time, etc. This will also enable you to complete a higher volume of tasks. Quality is *most* important in outbound, but quantity is also important.

The best SDRs do all the little things right, and it's impossible to do that without structure.

For example:

- Eat your broccoli first, and do the hard stuff in the morning.
- Plan your campaigns at the start of every month and try to back your way into your quota with funnel math.
- Send a reminder to every prospect you've booked a call with (for yourself or your AE).

### Do a lot of work on Fridays

- Friday pickup rates are great; people are in a good mood.
- Friday early afternoon, before everyone takes off, is a great time to call.

## 2. Proactive

Actively seek new tools/ways to improve. If something prevents you from hitting quota, find a path around it.

Top reps don't rely on lists they are given, and they don't rely on just lists they can mass pull from a data source. They're trawling socials, data sources, and the internet for new, great-fit prospects/accounts based on buying signals and triggers and then reaching out to them on top of their other higher-volume outreach.

**Never be satisfied with a sequence.**

- Always be experimenting.
- The beautiful thing is you can snoop on what's working for your peers.
- Always snoop on what's working, steal from the best, and try it yourself.
- Understand your analytics and the math that powers your quota.

### **3. Growth-oriented**

A top-performing rep has the habit of wanting to be better. Always.

Both in the role itself but also outside of the day-to-day. Whether personally or professionally, the best SDRs are always looking for growth.

There are no new ideas in this world (mostly). Top reps look all over LinkedIn, blogs, webinars, and podcasts for new tactics and playbooks they can try to improve their game. Top reps don't rest on their laurels.

**No ego**

Especially if you're transitioning into a new role - the best way to learn is from your peers. All SDRs should have a bit of an edge to them.

- There needs to be a little bit of competitiveness.
- Allergic to being stuck in the middle.

### **4. Teachable**

Seeking feedback and implementing the change to your process/technique is one of the hardest things to do. Someone curious and wanting to get better will always strive.

Like with any role, reflection is often ignored.

Reps who make time to listen to their own calls, review where their meetings are coming from and why, and note what's working and what's not, improve at a way faster rate than their peers and are more efficient.

**Role-plays**

Your prospecting will be easy if you/your peers are tough on role-plays. Give yourself practice at thinking on your feet, active listening & responding, and maintaining control of the call as well as practice objection handling and other important talk tracks you have. The more at-bats you are, the better you'll get, and the less you'll flounder. Top reps create those opportunities for themselves.

### **Check in with your AE after every call you book for them**

- Make sure the prospect showed up, and you can consider them handed off.
- Double-check any pre-qualification issues. Were they the right person? Right company?
- Was there anything you could have done to set up the call better? It's easy to get in the habit of oversharing on a call because you're excited. Finding the right balance of information to share is vital. Think about the perfect movie trailer; it gives just enough to get you excited about the movie without giving away the key plot.

### **Follow your AEs through deals**

- You'll build a better relationship with your AE
- You'll learn to identify opportunities better.
- You'll learn what it takes to be a great AE if that's your goal.
- You'll learn how they talk to clients and handle objections, which will make you a better salesperson.

## **5. Resilient**

Sometimes it takes 10+ touches to get a prospect on the phone. Sometimes it takes 2 'nos' to get a 'yes.'

Never get too high, and more importantly, never get too low. The role itself is monotonous and often filled with rejection. It is important as an SDR to stay as even keel as possible (especially when you're in the midst of a dry spell).

Be willing to put in the work, not just for one day but putting it on repeat for 2-3 years.

### **It's a sprint, not a marathon**

- Consistency over a long period is the key to success as an SDR.
- Ask for the next step on every call.
- Always ask at least one extra question when faced with an objection.
- Understand the minimum X you need to do every day - even if you're going to play hookey and take the day off.
- Don't sprint and burn out.

- Pick a speed you can maintain for infinity.

Working hard but also still having fun/enjoying the day-to-day. These are not mutually exclusive! The best SDRs work hard but also have the most fun doing it.

## **6. Creative**

As an SDR, you are the movie trailer, not the movie. This means you must master the art of only sharing enough info with the prospect to get them interested in taking a call with your AE but not so much that they won't learn anything new.

Prospectors are trying to stand out in a sea of emails, and strong, relevant, timely personalization significantly impacts breaking through the noise and getting replies.

Make time to be creative and try new things.

## **7. Put your prospect's pain first**

When you spend so much time learning about your product, benefits, features, etc., it is understandable that you may want to lead off a call by talking about them, but it's not going to earn you an opportunity to book a meeting with the prospect.

If you've managed to get someone's attention, the first thing to understand is if the value your company provides is worth the prospect spending some of their attention on right now. Most buyers won't be in a position to buy right now, so treating them like a live customer is only demonstrating that you don't understand or care about their circumstances.

Don't waste it telling them about what you can do until you understand if they're even remotely interested in. Think about the last time someone shared detailed information about a hobby of theirs that you had zero interest in, chances are your brain just turned off. For example, if I were to talk to my wife about the last Magic Card deck I built, she will listen, but I don't expect the conversation to go too far.

You cannot solve a problem that doesn't exist or that you do not understand. Listen, absorb, and ask good questions to understand your prospect's needs.

Good reps know their offering/market/customer, while great reps understand their prospect's pain and can empathize with them.

Top reps are reading the content their prospects read, checking out industry reports, etc., so they can understand the prospect's context and be thought leaders. A great rep speaks the

prospect's language and can offer insights the prospect may not have (e.g., a new regulation has been proposed, a competitor just raised funding, or a new technology is emerging).

## **Bonus Resources**

Collin's favorites around time management are:

- [The Unschedule](#): A Counter-Intuitive But Highly Effective Time-Planning Method to Beat Procrastination
- [Ryan Reisert's buckets](#) to Consistently Hit 100+ Activities Per Day

# Channel Theory

How to find unusual places to reach potential buyers?

Phone, email, and LinkedIn are SDRs' most common channels but are not the only ways of reaching your prospects. In fact, they might be the worst (*hint: it's likely that 2 of 3 will be really good for you*). But what about finding that edge over your competitor SDRs? If you want to win, you need to find the green space.

Before you try to slide into someone's DMs please make sure you have a firm hold over the channels that are working for the rest of your team. Do not use this as an excuse to miss your calling quota; time investments in these channels should be considered experimental. Words of caution aside, I believe almost anything is worth a test.

Here's a list of ideas to consider, starting with the most obvious and working out from there:

- Put yourself into the mind of your buyer. They have an unmet need they are trying to solve; if you were them, where would you go to look for an answer?
- Conferences, local networking events, etc.  
What conferences are your customers going to be vendors at?  
Look for meet and greet/coffee hours at conferences (e.g., SaaStr has Brain Dates, which have been a great source of meetings for us).
- Appropriate social networks; use your best judgment here. I probably wouldn't use Instagram to reach police officers, but I know the platform can successfully book meetings with personas in the hospitality marketing space.
- Old school forums.
  - [macrumors.forum.com](http://macrumors.forum.com)
  - [912bbs.org/forum](http://912bbs.org/forum)
  - [stackoverflow.com](http://stackoverflow.com)
- Relevant subreddits.
- Can you go and knock on their door? No, really, nobody does this anymore, so why not?
- Are there relevant groups on Facebook or LinkedIn?
- Are there any local user groups or meetups? Meetup.com is a great place to look.
- Any relevant Slack communities? (e.g., [this podcast](#) has a solid slack community).
- Look for Google Group-based communities (e.g., [Modern Sales Pros](#))
- Do you know any other SDRs that prospect to the same customer base? We've traded intros with other salespeople, and it works well.



# SDR Expectations

This section will discuss the important numbers you need to know in your role—activity, outputs, timeframes, and quotas.

Welcome to being an SDR. Here is your bag (*also known as your quota*); carry it wherever you go, and make sure it's always packed. That's the goal; you'll make good money if you do that. Nothing else matters if your bag is full or overflowing, but getting there involves doing some math.

Everything starts with your quota and can be extracted from there.

Here are some rough quota ranges that we've seen. These will vary based on what you sell, who you sell to, and how competitive the market is. Newer offerings are generally easier to sell and will have higher quotas, while more commoditized offerings will have lower expectations because of competition.



## Small and Medium Business (SMB)

10 - 12 meetings held per month



## Mid Market

7 - 10 meetings held per month



## Enterprise

4 meetings held per month



## Named Accounts\*

1 - 3 meetings held per quarter

*\*This doesn't necessarily mean "account-based"; every company has a list of the top 10 most important accounts they could close. Bringing in a meeting with the right person at one of these accounts usually requires taking many meetings with other people at the target company.*

The type of account you are selling into will influence your team's sales development style. As a general rule, as you move from SMB to Named Accounts, you might need to implement higher touch styles. The styles can be generalized into the following groups:

**High Volume:** (email or phone) utilizes a high volume of activity with a low expected conversion rate. No research or personalization is happening before each activity. A high-volume approach generally suits large markets (> 20K accounts). There are a few high-volume combinations:

- Phone-only
- Email-only
- Email + phone (calling opens only)
- Email + phone (integrated into a sequence)
- LinkedIn (fully automated)

**Personalized:** generally includes phone, email, and social channels and introduces a research and personalization step.

It involves looking up either the Account or Contact, digging for something relevant, and including that research in your email and phone scripts. A personalized approach is the most common style and is generally applied to medium-sized markets (1K - 20K total accounts). There are a few varieties of Personalized Styles:

- **Segment personalized** = SDR researches something relevant to a small segment of accounts and uses that to personalize the email messaging and phone scripts.
- **Account personalized** = SDR researches something relevant to each Account and uses that to personalize the email messaging and phone scripts.
- **Individual personalized** = SDR researches something relevant to each Prospect and uses that to personalize the email messaging and phone scripts.

**ABM Supported Sales Development:** involves coordinating your efforts with your Marketing team's ABM playbook. SDR activity is prioritized based on intent signals that the ABM program creates. It is common for SDRs to use a mix of manually working prospects (no automation) and adding them to Personalized sequences. The ABM Supported Style is generally applied to small markets (< 1K total accounts).

**Daily activity ranges vary by style:**

- **High volume** = 100 - 125 activities per day.
- **Personalized** = 25 - 75 activities per day, depending on the level of personalization.
- **ABM** = 10 - 50 activities per day.

These are rough ranges to familiarize you with what you might see; they are not hard and fast rules, merely rough guidelines.

Now, let's look at a quota of 10 meetings a month that uses a Personalized approach to target Mid-Market accounts.

Your quota might be 10 meetings, but you'll probably need to book 12 to 14 meetings to hit those 10 consistently. Why? Because you can expect 80% of people to attend your meetings, you'll need a buffer if you want to be consistent.

Additionally, sometimes people misunderstand the context, misrepresent their responsibilities, or just agree to take a meeting to get off the phone. So you should factor in that some prospects won't meet your Ideal Customer Profile and won't count against your quota.

In the early days, when you're still learning, this number might be as high as 20%, but that will improve as you get to know your ICP and what your AEs are looking for.

**So let's do some math:**

| Monthly Quota                  | Monthly Booked Goal | Weekly Booked Goal |
|--------------------------------|---------------------|--------------------|
| 10 meetings held that meet ICP | 14 meetings         | 4 meetings         |

| Daily Booked Goal                           | Weekly Booked Goal                           |
|---------------------------------------------|----------------------------------------------|
| 1 meeting (with a one-day buffer each week) | 3 x 90 - minute blocks w/ 25 activities each |

Being able to translate your monthly quota into hourly or daily activity goals is one of the best things you can do if you want to give yourself the feeling of control over your quota. Otherwise, staring at 14 meetings every day can be a daunting task.

It's much easier to create 3 x 90-minute blocks in your calendar each day and work to hitting your goal of 25 tasks in each of those blocks.

One of my hockey coaches shared a helpful idea with me once: *don't worry about the game's score*. Focus on winning every shift. If you do look at the score, focus on winning each period. Breaking down your performance this way makes it easier to produce consistently without getting overwhelmed.

# Skills Development

Here you will find guides to the most relevant skills you will need to succeed in the SDR role.

## Skills

[Developing Empathy for your Customer](#)

[How to Identify a Good Account](#)

[How to Identify a Good Prospect](#)

[Sequence Design](#)

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# Developing Empathy for Your Customer

Remember, your goal as an SDR is to *find unmet needs*, and you can't do that unless you have a deep understanding and empathy for your customer. The ideas below will give you a framework for understanding how they think about the problems facing them.

There are a number of ways to define one's understanding of a customer. The simplest way is that you need to understand the core unmet needs they are facing, the context behind why those unmet needs exist, how your team is positioned to help solve them, and how your solution compares to the alternatives in the marketplace. Put a different way; you need to understand your:

**Targeting hypotheses:** the criteria you apply to create the list of companies and contacts you're going to reach out to for each segment.

- **Company targeting criteria** - what are criteria or signals that mean a company is a great fit for your business?
- **Persona targeting criteria** - what are the criteria or signals that mean a person is a great fit for your business?

**Need hypothesis:** defines the context behind the unmet need.

- **Persona responsibilities** - what does their job description say? What role do they play within their organization?
- **Persona goals** - what are they trying to achieve this year? What KPIs are they measured on?
- **Job to be done** - what specific progress are they trying to make to achieve their goals?
- **Obstacles** - what friction do they encounter when trying to make progress?

**Solution hypothesis:** defines how you solve the unmet need.

- **Alternatives** - what are their options for solving this pain and how is your company positioned against them? Don't forget about doing it manually or doing nothing.
- **Unique** - what does your company do that your competitors cannot?
- **Relevant trends** - are there any trends that are making their unmet needs more painful right now?

**Return on investment:** can you demonstrate the back of the napkin math that shows why solving their unmet needs with your company will be profitable?

**Common objections:** what business case objections will a customer bring up?

Hint - ask your AEs for the most common ones and how they handle them.

Outreach has a great guide for handling common brush off, business case, and incumbent objections; [check it out here](#).

If you're a visual learner, you can see how these are laid out in our [MarketFit Matrix](#).

**Note:** this matrix was designed for building new sequences and doesn't include the objections or ROI sections.

## Related Content

Blog & Podcast - [How to Gain a Deep Understanding of Your Audience](#)

Youtube Video - [The Importance of Market Validation](#)

Playbook - [SHARED: Michel's playbook for customer development](#) - this document adds context on how your company found the unmet needs and provides guidance on running a day-in-the-life interview if you cannot answer some of the questions.

[The Framework For Creating a Product and a Brand New Category](#) (Podcast & Blog)

## Homework

Fill out the MarketFit worksheet for three different Company/Persona combinations.

# How to Identify a Good Account

A good Account meets a set of criteria that indicate they are likely to need what you sell. These sets of criteria are often referred to as Ideal Customer Profiles (ICPs), market segments, or company targeting criteria. These all mean roughly the same things when used in a sales development context.

Your ICP is a representation of the types of companies you want to work with most. It is a combination of the firmographic qualities that make a certain company most likely to purchase your product/service and most likely to get value from it. Firmographics are qualities like the number of employees, revenue, geography, industry, etc. Your ICP can also include things like technology signals, having a specific job function in their org chart, or having a functional department.

You will likely have more than one ICP, meaning there is more than one segment of your target market that you'd like to work with. Your market segments might differ by any of the criteria above, but the most common three are: Industry, Revenue, and Geography.

When you're building a sales development sequence, the question you want to ask yourself is, *'what is the biggest group of customers in this target market that I could reach out to with exactly the same message, and that message would resonate?'*

Sometimes these groups are very large, and sometimes there might be only a few. Your answers will help you determine which sales development style is appropriate for the sequence. Here are two questions to guide you:

- How many accounts exist within each segment?
- How many buyer personas are there, on average, at each account?

If you approach your value proposition differently or mention a different pain point with one group than another, they are two distinct segments. You can segment your market based on many things, including:

- Industry
- Revenue
- Company Headcount
- Last Funding Round
- Geography
- Use Case
- Buyer Persona
- Account by Account
- Their Customers
- Triggers

## How to Identify a Good Prospect

A good contact meets a set of criteria that indicate they are likely to need what you sell. These sets of criteria are often referred to as Buyer Personas, Personas, Customer Avatars, or contact targeting criteria. These all mean roughly the same things when used in a sales development context.

Your Persona defines the traits of individuals at your ideal company who are most likely to purchase your solution. A Buyer Persona is typically related to an ICP, and the combination of the two defines who will end up in your sequence.

Your Persona is a representation of the traits of individuals that have purchased from you in the past. It includes a combination of the demographic qualities that make an individual more likely to purchase your product/service and most likely to get value from it.

Demographics are qualities like job title, seniority, job keywords, time in the role, etc. Your Persona can also include qualitative things like subscribing to X methodology (ex., Agile, Scrum, etc.), has read Y book (ex., Predictable Revenue), or following Z (ex., Satya Nadella) on LinkedIn.

If you're doing this from scratch, look at the last 25 deals that have closed in your CRM, read all the email communication, and look up the profiles of anyone involved on LinkedIn. These are likely to be a strong representation of your Persona.

### Questions to understand about your persona:

- Which individuals experience the problems I solve?
- What is the impact of this problem on them?
- What goals are they trying to achieve?
- What are their jobs to be done?
- What does their day-to-day look like?
- Where do they consume information? Where do they spend their time online? Which communication channels do they use?
- Do they have decision-making authority?
- Who else is involved in decision-making?
- Where do they need to be based?
- What happens to them before they need a solution?
- What happens to them before they are willing to pay for an external solution?
- 

Think of your buyer personas the same way you think of segmenting your market. You can group some together, but you will likely want to approach them differently. When creating a list for a Sequence, ask yourself, *'what is the biggest group of individuals in these companies that I could reach out to with exactly the same message and that message would resonate?'*



**You can segment your buyer personas based on many things, including:**

- Job Title
- Function
- Seniority
- Geography
- Use Case
- Triggers

The larger your target companies are, the larger the buying committees and the more numerous and differentiated your buyer personas are likely to be. The smaller your target companies are, your buyer personas will likely wear more hats.

## Sequence Design

When it comes to putting together a sequence, there are three factors: Hypothesis, Style, and Structure. The Hypothesis answers the big questions like who you're targeting and why. The Style determines how much time you'll invest in each prospect as well as the channels. And the Structure defines the actual steps, messaging, and order of touchpoints.

Notes:

- Every sequence should start with an A/B email

## Hypothesis

How do you create a Hypothesis?

- Map out all the Market Segment, Persona, and JTBD combinations in a spreadsheet
- Pick the combination that represents your best customers
- Create messaging that speaks to one specific JTBD/Persona/Segment combo
  - This is your H1 or Hypothesis 1. If you do this right, you'll test many hypotheses.

An example of a simple Hypothesis is:

- **Market Segment:** B2B Startups that have raised between \$1m - \$5m
- **Persona:** VP/Director of Sales
- **JTBD:** Needs to generate more pipeline in order to hit 24-month growth targets
- **Core message:** Do you need more pipeline to hit your growth targets?

**Note** - if you're not familiar with the term Job to Be Done (JTBD), it is a way of communicating the specific progress someone is trying to make.

You can do this in a google doc or spreadsheet.

Document: [Hypothesis Planning \(Marketfit workshop\)](#)

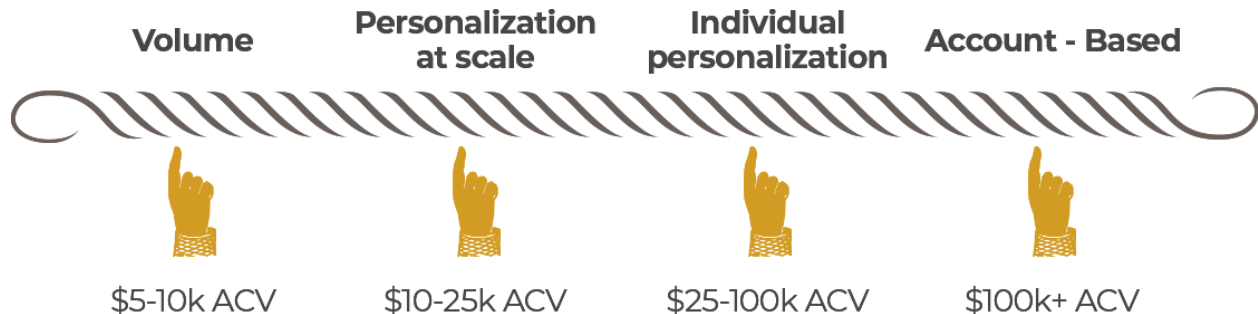
Spreadsheet: [SHARED \[COACHING\] WORKSHEET: Market Fit Matrix \(TEMPLATE\)](#)

## Style

Determining your Style is not a fashion choice; it's the result of a decision between efficiency and effectiveness. It requires considering your desired cost to acquire a customer (CAC), the size of your market (number of companies and contacts), and deciding whether to optimize for speed or conversion rate.

The determining factor here is how much time I want an SDR to invest in attempting to convert a single account. If you choose a volume approach, you'll be able to reach many prospects very quickly with a relatively small team.

On the other end of the spectrum, approaching the same market with an Account Based Style will deliver a much higher conversion rate but requires a more experienced SDR, more supporting resources (ABM campaigns, tooling, training, etc.), and will cost more.



You can use this math for each Hypothesis to determine what sales development approach will give you the results you're looking for.

For simplicity's sake, we have segmented the types of approaches into four styles. Those are: volume, personalization at scale, individual personalization, and account-based. In reality, your outreach can exist on a sliding scale between the buckets. You also don't have to commit to just one style at a time - but more on that later.

### **List vs. Account-Based**

We see a lot of variety in SDRs working Lists vs. being given a list of Accounts, and there is no right or wrong answer. List-Based is faster to implement, but Account-Based will have a better conversion rate; you can decide which is right for you now and can always change later.

Many new sales development teams start out with List-Based and then transition to Account-Based when they have more than a few reps. That said, let's talk a little about each to help you understand their advantages.

#### **List-Based**

Using filters in a database to determine the accounts and contacts that will be added to a Sequence. A List-Based approach is best for large, wide-open markets, and quotas will be higher as a result.

#### **Account-Based**

Leadership decides 'the list' of accounts that represent your TAM and assigns an SDR a subset of them to work. The SDR is then given the flexibility to find the best way into the organization.

An Account-Based approach is best for companies with smaller markets and larger deal sizes because the conversion rate will be the most important metric.

## **Volume**

The volume style is all about bang for your buck. You're looking to spend as little as possible to generate as many opportunities as possible. You will need to leverage technology as much as possible to scale your outreach. The team structure needed to do that will depend on the channel you're using.

**Channel(s):** either 100% email or 100% phone.

## **Personalization at Scale**

This style is all about leveraging targeting to make generally written messaging seem like it was written specifically for one person. Building on the Hypothesis example from above, we add an extra filter criterion that is relevant to the buyer.

When niching down like this, the question to ask yourself is, how does the context my buyer lives in change when I change one of these variables? A common example is geography. Does a VP of Sales from SF have different demand gen needs from one in LA?

It might not seem like much at first glance, but let's consider that SF is the startup capital of the world; it has the shortest average tenure of an SDR and the highest average cost of an SDR.

Incorporating this context is a great way to write messaging that you can send to a small group of prospects that will feel like it was written just for them.

**Channels(s):** A mix of email, phone, and social. A phone is a non-blocking activity geared toward calling on prospects that have engaged with your email.

## **Individual Personalization**

This is when you're researching and writing at least one piece of custom messaging for each prospect. A general rule is that 20% of your email copy should be personalized. You might do this for every email you send or just for your first email.

**Channel(s):** A mix of email, phone, and social. The phone is used as a blocking activity and incorporated into the steps of a sequence.

## **ABM Supported**

This is when you're getting ABM support from your demand generation organization. Campaigns are built off of internally created intent data.

**Channel(s):** Builds on the above Styles and incorporates intent data or signals from an ABM campaign as a starting point.

## Structure

The structure of a Sequence will vary by Style, but if we ignore Volume, then there will be a good deal of similarities between the rest of the styles. There are a few methods for designing a structure, the direct sell, the relevance, or the relationship.

### Direct sell

This approach assumes the prospect has pain and asks for a meeting.

### Relevance

This approach assumes we have the right buyer and asks if the pain we can solve is relevant to them right now.

### Relationship

This approach focuses on building a relationship with the prospects by sharing information that might be valuable to them and finding ways of helping.

### Steps

These are the actual activities that will be carried out by an SDR.

- **Email:** 3-7 emails in a 30-day period
- **Phone:** 3-10 calls in a 30-day period

### Triggers

These are the *'if this, then that'* rules you can build into a sequence. A common example is 'if a prospect reads an email 3x, create a call task'. Triggers are non-blocking tasks in a sequence and are best acted on in real-time for maximum effect.

## The Double Tap Structure

- 3-4 emails in a 30-day period

Call with voicemail, followed immediately by an email. Social touch a few days after each double tap. Out-of-sequence calls as needed. Repeat 4x in 30 days. Rest them for 4 months.



# How to Write a Cold Email

Below is the most common approach, advice, and guidelines we use to write cold emails.

## Strategy

Before creating messaging or a sequence, we need to look at the overall Strategy of your go-to-market motion. For that, we recommend using the idea of the Crux<sup>1</sup> from Richard P Rumelt.

- **Situation** - outlines the relevant context of your potential customers
- **Diagnosis** - defines the challenge that is holding them back from achieving their goals.
- **Guiding Policy** - defines your approach to helping them overcome their challenge.
- **Coherent Action** - defines how the guiding policy will be carried out.

Writing these down on paper or in a doc can be a helpful exercise for building understanding and empathy for the user across everyone that will be involved in the outreach. If you are an SDR, it is important to understand your company's answers to the above before embarking on any sales outreach.

- **Strategy** - see above.
- **Method** - which styles/tactics/approaches will get the best result?
- **Messaging** - what is the core message?

## Guidance - ideas to consider before you put pen to paper

- Ask yourself what you are trying to accomplish with this sequence.
- The email communication should act as a movie trailer, sharing as little as possible to get the prospect's interest.
- Remember that you're not selling your product over email. Between 2-5% of people are looking for a new X; your strategy should recognize this.
- The overall goal of a cold email is to establish a relationship and ask to see if they need what you have. Maintain a relationship with those relationships by not being annoying. Brevity is key here.
- Your email should look like the buyer's normal email traffic.
- Good messaging is Relevant, Thoughtful, and Human.
- Good messaging builds on your Hypothesis, Style, and Structure.
- Don't get too attached to your first version.
- Send in small batches of 100-200 prospects, send them weekly, and try to launch them on the same day.
- If you're starting fresh, it can take months of iterations to really get this tuned.
- The best day of the week and time of day is now.

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<sup>1</sup> Source: [Summary of Good Strategy Bad Strategy](#)

- Keep your emails below 50 words for best results. A good method for keeping emails short is to pretend each additional word costs \$1k in missed commission; if that's the case, how will you spend your word budget?
- You are only allowed one question mark per email. If you ask a prospect 2 questions, it reduces the likelihood of them replying to the one you want. Additionally, adding another question makes your email longer which can further reduce your chances of getting a reply.
- Hey is the most effective greeting (per SalesLoft).
- Avoid bullets and dashes.
- Stick to plain text; HTML is a dead giveaway that this is automated.
- One link per email (max), 0 is better.
- "Best" is the best sign-off (per SalesLoft's data).

## How to Design Your Messaging

There are no right or wrong methods, and here are a few that we've used successfully:

### The Relevance method

Targets any buyer personas, shares an insightful piece of content and asks if the problem is relevant to them at the moment.

### The Referral method

Specifically targets people that are adjacent to your buyer and asks for a referral.

### The Garrison method

Lead with the benefit and ask if it's relevant. In as few words and as directly as possible - do you need my thing?

### The Fastball method

Assume the prospect has pain, and ask if they're looking to solve it now.

### The Influences approach

A modified version of the Referral Method where you reach all potential buying influences (user buyer, advisor buyer, technical, and economic) with different messaging. Start with all non-economic influences and end by sending a personalized email to the Economic influence sharing what you've learned.

- **User/Champion** - have you ever heard of our thing? The goal is to get them to check the thing out.
- **Advisor** - do you know if your <department name> has ever looked into <problem space>? The goal is to learn if they have ever considered solving your problem space.



- **Technical** - do you have any concerns about implementing <problem space>? The goal is to understand if any technical limitations prevent it.
- **Economic** - I talked to X & Y, and they mentioned that your thoughts on <problem space> were <what you learned>. The goal is to share your personalized learnings and ask for a meeting.

## Think in stages

- Subject line = generates opens.
- Body = generates responses.
- CTA = generates meetings.

## Subject line

- When you watch a movie trailer, you get the gist, leaving you wanting more.
- Hook that grabs attention.
- Personalization comes into play - what does this person care about? Not “first name + X.”
- Don’t trick the buyer into opening an email.
- Successful = on-time closes every month / P&L by a client for agencies.
  - Cuts right to the value prop.

## Body Copy

- Who are you, and why are you emailing me?
- Why should I care?

## Call-To-Action

- What is the ask?
- The perfect cold email is one sentence that accomplishes all three goals. Realistically, it’ll be 2-3 sentences.

## Bonus

We have a fantastic podcast episode with Josh Garrison, Head of Marketing of Apollo.ai on how to book a meeting over email. If you want to learn more, check out the episode [here](#)!

## Our Cold Email Writing Process

### Step 1 - Get to know your customers

- Interview your customers
- Talk to your product organization
- Find industry advisors that act as bullshit filters (esp if you're new)

### Step 2 - Segment strategically

- Trying to speak to everyone means you're not speaking to anyone
- Good messaging feels like it was written specifically for me, even if it wasn't
- [Be relevant](#) by using intelligent segmentation
  - Targeting hypothesis - who they are
  - Need hypothesis - what they need
  - Solution hypothesis - how you solve their need in a unique way

### Step 3 - Optimize for your sales development style

Remember that your messaging does not live in a vacuum. Consider what other steps will be involved in the sequence. Will you be calling, researching, personalizing, engaging with them on social media, etc.

### Step 4 - Write the body of the email

- Start with pen and paper → manual process.
- Every email needs multiple editing steps.
- Write it on paper, wait a day, then put it into google docs, wait a day, and put it into your CRM.
- Build the structure email/phone elevator pitch.

Part 1 - introduce your trigger / the reason why you're reaching out.

Part 2 - transition - demonstrate why it's relevant / how you can help.

Part 3 - conclusion/CTA - ask for the meeting.

### Step 5 - Write the subject of the email

- Summarize the email in as few words as possible.

### Step 6 - Test, measure, & iterate

- Remember that it takes time.
- The only thing I can guarantee when you're writing your first version is that it sucks but it will get better.

## **Collin's Process for Putting It All Together**

I start with a blank page, write out the relevant context at the top from memory (no copy-pasting), and add my headers (ICP/personas, context, subject line, connection statement, bridge, CTA).

The context is there to keep everything relevant and fresh in my mind. The other headers are there because I'll write many different versions for each. I typically start with the subject line and work down, but it's a messy process, and I often have an idea for something lower down that requires me to rework everything. This is normal. The first version of everything is going to be shit, so if my brain wants to write it down but I think it's bad, I write it down anyway so I can keep moving forward.

This often looks like 5-10 lines under each header with a bunch of different ideas/themes before I narrow in on the exact messaging I land on.

I don't normally land on just one great idea. I'll have 2-3 that seem like they might work, and then I'll share my notes/logic/copy with someone else and get their feedback. Sometimes I miss something important and take the copy in the wrong direction; this is why it's critical to lay out your thinking like this; it helps the next person catch up on how you got here.

The last thing I do is create a block of 90 minutes, and when the alarm goes off, I have to close the doc. This creates a sense of urgency and prevents me from taking all day long to write the perfect email.

## How to Personalize an Email

This section will help you understand what to look for when adding personalization to your email templates and cold call scripts. Investing time in personalizing 20% of your email is a trade of efficiency (you'll send fewer than if you fully automate them) for effectiveness (you'll convert a larger number of prospects than an automated sequence).

Keep this in mind as you're progressing. There are no silver bullets for sales development, only things that have worked for others in the past, so make sure you approach this with an experimental mindset. If it doesn't work the first time, don't give up; test, iterate, and learn what does work.

When utilizing personalization, there are four key areas that you can personalize:

- Subject line
- Intro line
- Body of the email
- PS line
- Bonus - you can leverage personalization in your cold call and voicemail scripts

As a general rule, you want to personalize 20% of the email. Ideally, these are based on buying triggers (see above), but if you cannot find one, these personalization elements can help make your emails more relevant to your prospect.

We're doing this to make it feel like the email has been personally written for the prospect. We're trying to convey that we understand and empathize with the prospect. Achieving these two will help us build trust with the prospect and increase their chances of replying to our emails.

The goal of the email is to start a conversation. You can generally go for two types of calls to action: a hard and soft CTA. A hard CTA goes right for the meeting: *"I think we can help; how does your calendar look for Y date?"* and a soft CTA simply asks a question, *"Noticed your sales team is growing; are you using Salesforce?"*

The goal of the soft CTA is to learn something and keep the conversation alive. Creating engaging and insightful conversations is the key to booking great meetings.

The goal of the hard CTA is to turn the conversation into a meeting.

Below are some suggestions for personalization, sorted from strongest to weakest, along with some examples of each:

## Network

Shared connection or referral.

*“Hi, John - I noticed you’re also connected with [Name] we [how you know them].”*

**Note** - “We’re also connected on LinkedIn” is probably not a strong enough signal for this approach.

The best cases are:

*“We used to work together at [company],” “he used to be or work for one of our customers,” or “we went to college together.”*

Benefits:

- **Upside** - Leverages your individual connections, which can be quite strong.
- **Downside** - It doesn't scale very well + requires personal knowledge of each contact.

## Person

Something specific to their job title.

*“Hi, Sara - as a [job role here], I imagine you’re dealing with [common high-level pain point] in your role at [company name].”*

OR

*“Hi Sara - many of our customers that are [job role here] have been dealing with [common high-level pain point] how are you handling it at [company name]?”*

**Advantages** - this approach scales really well, but you need to hit on the exact pain they might be feeling that you can help with.

**Disadvantages** - While it scales well, honing in on a single pain may limit the replies of those not feeling that pain. If you don't get the pain right, it can make it look like you don't understand their role at all and are just blasting them with generic messaging.

## Content they've published or interacted with

*“Hi, Mike - I saw you published an article on [topic], and it reminded me of a book I wrote called [book name] that talked about [the general idea of the book].”*

**Advantages** - Shows that you read and thought about their article. It also creates curiosity because they're now curious about the connection you saw in their post. It also makes them feel good because you're comparing their article to a well-known/respected book.

**Disadvantages** - We'll need a list of books, topics, and one-liners for each topic we might encounter. If you get the book recommendation wrong, it can show that you didn't actually read their article.

## Something personal about them

*"Hi, Jane - I noticed you used to work at [company]; they're a customer of ours and have been doing really well."*

You would need to start a campaign by building a LinkedIn list of customers, then filtering by ex-employees, then filtering by people with the right job title.

*"Hi, Jane - I noticed you went to [school], go [school mascot]!"*

OR

*"Hi, Jane - I noticed you used to work at [company]; we're a customer now and loving it."*

## Company

News about them.

*"Hi, Jim - I noticed [your company] just raised a [name of round]. We find that once our customers have raised that level of capital, one of the first things they invest in is [our product]."*

OR

*"Hi, Jim - I read an article about your C-level/VP/etc. that mentioned they were looking to invest in [product space]. When our customers have made these investments, they usually find [the benefit of service]. Is that something you're thinking about?"*

## Blog post they published

*"Hi, Jane - I read your post on [article topic], [insightful question about the post]."*

## Share a cool or recognizable customer

*“Hi, Jane - I noticed that we both work with [shared customer]; they’re amazing. Do you know [customer contact]?”*

## Shared customer/supplier

*“Hi, Jane - I noticed that we both work with [shared supplier]; they’re amazing, is [supplier contact] your account manager as well?”*

## Industry

New trends

*“Hi, Jim - many of our customers are feeling the pressure of [major industry trend] and are looking for solutions. How do you feel about the [major industry trend]?”*

Major conferences

*“Hi, Jim - I think I saw some of your team at [conference name] last year. Will you be attending again this year?”*

## More Resources:

See this great piece by [Cole Fox](#) for the ideal email format.

# How to Write a Great Follow-Up Email

There are two schools of thought when it comes to follow-up emails, short and sweet (3-4 emails total) and the long-form camp (7-8 emails). There is no right or wrong answer, but here are a few things to consider.

Your goal with any outreach is to start a relationship, and you need to balance the risk of not starting it (sending too few emails) with the risk of annoying the prospect (sending too many). Aaron always used to say, “*You could only be annoying by BEING ANNOYING,*” which didn’t fully resonate until I had kids; now I get it.

You also want to consider how your email sequence or cadence fits together, it doesn’t need to tell a story, but they should at least look like they were written by the same person at the same time.

This advice is generally focused on follow-up emails that are part of an automated or semi-automated sequence; however, many ideas are still the same if you decide to personalize the email.

If you are sending a manual or personalized follow-up, take a moment to consider any interaction you’ve had with the prospect or their company. These could be from email replies, cold call connects, or social engagement. I’ve known some people that have spent hours calling other people in the organization just to find something to personalize their follow-up email with; it’s a great idea for your biggest target account and a terrible idea for your smallest account.

There are a few tactics that I’ve used for writing my own follow-up emails:

Nothing new here:

- **Bumper** - a short, sweet reminder email whose goal is to ‘bump’ the email back to the top of their inbox.
- **Rephrase** - a short email where you rephrase the CTA or benefit from your first email.
- **Break up** - telling the prospect this is the last they’ll ever hear from you.
- **Check back** - asking for permission to check back next quarter.

Something new:

- **Alternate approach** - a similar format to your first email, but you try a different value prop.
- **Content share** - an email where you share or offer to share a helpful piece of content.
- **Comedy central** - a light email that ends with humor; use sparingly.

This is not a checklist! Please don’t go and try one of each back-to-back. I usually shoot for a 50/50 ratio of nothing new to something new.



Now that you know the rules, feel free to break them. This isn't physics; something that worked well for me will fall completely flat for you. My goal with sharing is to help you figure out what to do next if something isn't working. Sometimes it's helpful to see what other people have done, even if you have no intention of following their advice.

PS - feel free to experiment with PS' in your emails. Some of the ideas from the follow-up tactics can work really well in a PS. Some of my most successful emails were just setups for a great PS.

### **Related Content**

[Build a Personalized Playbook & Close the Gap Between Marketing and Sales - Becc Holland](#)

[How to Double Your Reply Rates: Cadence Best Practices -Jeremy Donovan](#)

[The 2 Personalized Touches That Generate 80% of Chili Piper's Opportunities](#)

[How to Tailor Your Initial Email Outreach](#)

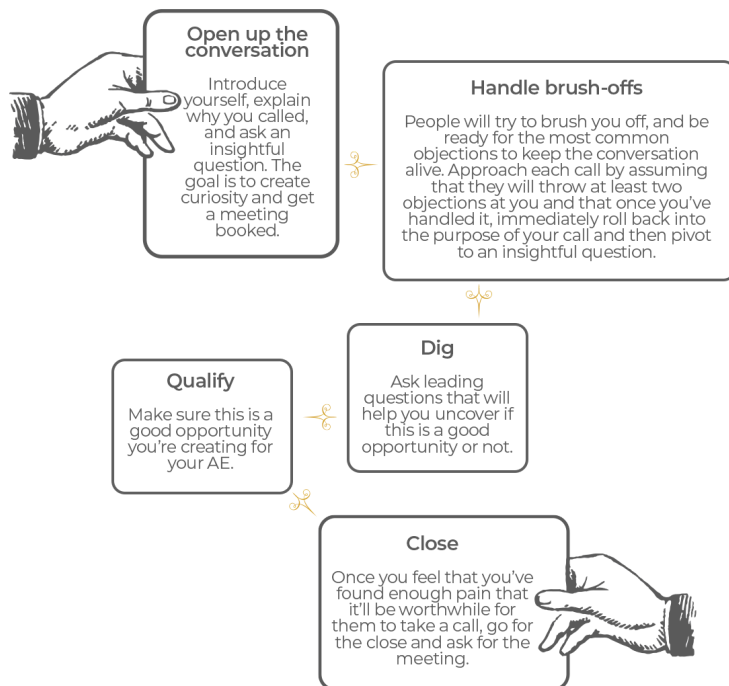
# How to Cold Call

## Mindset

The goal of a cold call is to establish a relationship with your prospect and determine if what your company can help with is relevant to them. Remember, only a small fraction (2-5%) of the market is in a buying mode at any given point in time.

This is important to understand whether you're building your cold call scripts for the first time or calling a prospect for the 12th time this month. We follow up with prospects regularly because 2-5% of people in a buying mode change every quarter. When you approach someone with an '*I just want to see if this is relevant to you today*' mindset, it makes it easier to understand why we're calling on them every quarter.

## Process



## Parts of a Script

### 1. Introduce yourself and ask for permission to keep going.

*“Hi, this is Collin with PR; how's it going? / did I catch you at a good time? / have you had coffee yet?”*

- *Did I catch you with two minutes?*
- *Have I caught you at a bad time?*

### 2. Explain the trigger.

*“The purpose of this call is to set up a meeting with you to discuss growing your pipeline because I noticed you were looking to hire SDRs...”*

OR

*“I’m calling because I noticed... [how they got on this list]”*

### 3. Lead with a statement.

*“Many of the sales leaders I work with in [CITY] are finding it hard to hire good SDRs quickly enough, and we help them stay on top.”*

OR

*“I work with sales leaders that are hiring SDRs to help them stay ahead of their sales goals while they’re ramping up, and I was wondering...”*

### 4. Ask an insightful question, then dig.

*“What does your SDR hiring process look like?”*

*“Are you ahead or behind in your hiring plan?”*

*“How is that going to impact your plan this year?”*

### 5. Don’t forget to qualify.

We want to know the following:

- How many salespeople do they have?
- Do their salespeople do their own prospecting?
- Who are their best customers?
- How do they currently build pipeline?

### 6. Handle their objections.

See the [next section](#) for a list of common objections and how to handle them.

## 7. Close

*“The purpose of my call today is to set up some time to show you how we can solve this problem. Do you have your calendar handy?”*

## Sample Scripts

### Hiring SDRs

**Intro** - *Hi, this is Collin with PR; how's it going?*

**Trigger** - *I noticed you were looking to hire SDRs, and some of our clients have found it hard to find good candidates in CITY; how has the process been for you?*

**DIG!**

- *Does that put you behind on your hiring plan?*
- *How does that impact your numbers for the year?*

**Leading statement** - *We work with a lot of companies while they are building out their internal SDR teams to make sure they're staying ahead of their pipeline goals.*

**Close** - *Can you see that being helpful?*

### Hiring AEs

**Intro** - *Hi, this is Collin with PR; how's it going?*

**Trigger** - *I noticed you were looking to hire AEs and couldn't see any junior roles supporting them, do your AEs do their own prospecting?*

**DIG! -**

- *What does their pipeline generation/prospecting process look like?*
- *How do you keep them on top of prospecting consistently?*
- *Are they consistent?*
- *Does that put you behind on your pipeline goals for the year?*

**Leading statement** - *We work with a lot of companies to support their AEs and make sure they're staying ahead of their pipeline goals.*

**Close** - *Can you see that being helpful?*

### Steli's Hiring Companies in the Area<sup>2</sup>

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<sup>2</sup> Steli's "calling startups in the area" on youtube. Script template.

**Intro** - *Hi, my name is Collin.* <Pause a second so they hear you and then jump to the trigger, don't leave so much space that they can cut you off with an objection before you get the trigger off.>

**Trigger** - *I'm calling companies in the area to see if they might be a good fit for a beta program that we're running.*

**Pitch** - *What we do in a sentence is offer startups a sales team on demand.*

**Response** - However they reply > *"Oh, awesome, what's your sales process like?"*

- Ask about their sales process and how they get leads.

## What to Do Once You've Booked a Meeting

What happens after you get that magical “yes,” and they agree to meet with you or your AE?

The first step has more to do with your sales process than it does with you. Some sales teams have the SDR take the first meeting, and others have them hand them off to their AE. It's nothing personal; there's generally an efficiency equation that someone has worked out. See, every step you add to the process will introduce a loss in the overall volume; said another way, people will drop off at each step.

Here are a few examples of when and where SDRs might or might not take the first call.

- Shorter sales cycles and/or lower value deals - optimize for removing friction for the buyer and booking directly with the AE.
- Really long sales cycles where you're booking high-level executives are likely to land directly on an AEs calendar as well.
- Higher velocity sales motions where you're generating multiple meetings daily for one rep are likely to be taken by the SDR.
- Sales cycles with technical salespeople are likely to have the SDR take the first meeting.
- Sales cycles where AEs invest heavily in discovery might have the SDRs take the first to double-check that they're a good potential fit.

If you're not running the first call, we recommend joining anyway and listening in. This will help you understand how the meetings you're booking are going, what good looks like, and what bad looks like.

It's also a great opportunity to shadow your AE, learn from them, and get feedback on how to improve the quality of prospects you're targeting. For the first 10 meetings you book, we recommend following them all the way to close for the same reasons.

In most cases, we recommend SDR continue to join the first call with their AEs.

Back to that magical “yes,” what do you do next? Here's our process for when you get that yes on a cold call:

- Tell them you'll send the calendar invite and ask them to accept it. Here's some language that's worked for our Director of Coaching, *"Just making sure that comes through on your end. Do you see it? If that time works for you, would you mind accepting it?"*
- Confirm next steps (*"I'm going to shoot you an email introducing you to my colleague, X. You'll meet with them on Y day at Z time. Did I get that right?"*)
  - **Note** - for the confirming question, feel free to use a phrase that feels natural to you. I tend to use “*sound good?*” and “*ok?*” with an upward inflection, so they

know it's a question. The important part is that you ask them if you got the date and time right, and they say yes.

- Fill in your notes for the AE. Include qualification criteria and anything that will help them prepare for a great meeting. The most important thing you can do for your AE is to help them understand the context of the call, how interested they seem, and what piece of your pitch they seem most interested in.
- Send the introductory email. *"Hi {Prospect}, please allow me to introduce you to AE {Name}. They'll be joining our call at {Date and Time}."*
  - The intro is an opportunity to 'sell' your AE; if there's something relevant or interesting about them, you can add it here. E.g. when I'm introducing Peter (our AE), I like to add that he was our best SDR back in the day. It adds credibility to the prospect because it's a small piece to show why they're the most relevant person to have that first conversation with.
- If the meeting is more than three days out, follow up the day before with something useful as an excuse: *"I pulled this article/case study/blog I thought you might find useful/interesting in the meantime. See you tomorrow!"*
- If you couldn't get them to accept on the call and they haven't accepted, make sure they do. email/call/LinkedIn to confirm. If they didn't accept on the day of the meeting, send them a follow-up the next day to make sure they received the invite. *"Hi {Prospect}, I noticed you haven't accepted the invite. Does that time still work for you?"*
  - You can try variations of the ask here like, *"Does that time not work for you?"*, *"Did you see the invite?"* etc.
- Be ready when the meeting is scheduled to occur - if the prospect is late, call/email/LinkedIn. If they no-show, get them into a no-show sequence with call/email/LinkedIn to get the meeting back into the books.

## How to Handle Objections

The goal of handling objections is to keep the conversation alive and give yourself another opportunity to book the meeting. Think of all of the below as speed bumps that you might run into; if you're prepared for them, then it's only going to slow you down; if you're not, then it will derail the conversation.

Before we get into the how, let's talk about the why. We are programmed to listen to people, especially older people in positions of authority (see Dad, I listen...). So when a prospect tells you they're busy, not interested, or asks you to leave them alone, it's easy to follow our automatic programming and hop off the call. This is one of the easiest places to get stuck because you can do everything else right and still not see the results you expect.

Fortunately, this is a solvable problem and just requires a subtle shift in your mindset. We've covered Mindset above, so I'll highlight the important pieces.

First, if you have empathy for your future customers and understand the progress they are unable to make without you, it's almost rude if you don't interrupt their day. Second, the phone is still the most common channel for booking a meeting with a prospect, no matter what any book says (looking at you, Predictable Revenue).

There was a period between 2012 - 2016 when it was incredibly easy to book all your meetings over email, and yet, most professional SDR teams were still using the phone, especially in the enterprise. Third, 95% of the objections you will hear are not real no's.

The process to truly assess whether or not your product can be helpful for your prospect involves a deep understanding of the problem space and how you're uniquely positioned to solve it. There are no 'best' products but many different shape solutions that each solve the problem in their own unique way.

In the ten seconds it took you to deliver your opening few lines, how deep of an understanding do you think the prospect has? Unless you've had a 5-10 discovery with them, they fully understand why you're unique, and that uniqueness isn't relevant to them; it's not a no. Even in the previous example, this isn't a no forever, just a no given the current circumstances, and those circumstances are likely to change.

Change typically occurs on a quarterly basis because that's when executive teams conduct their planning sessions and outline the priorities of the business.

If you haven't made a 10-minute discovery with the prospect where you both arrived at a point of mutual understanding - you fully understand their situation, and they understand yours - you're not receiving a no; you're receiving a brush-off.



The following are a few brush-off objections and how we've handled them in the past—special shoutout to our podcast with Steve Ross for some of the replies.

### **I'm not interested**

- *Could you give me 27 seconds to explain what we do?*
- *That's fair {NAME}, many of my best customers also said they weren't interested when I first called, but now they have {benefit statement}, do you mind if I take 27 seconds to explain how we did that?*

### **I don't have time**

- **Fastball:** *I'll be brief... go into your pitch.*
- **Slowpitch:** *I totally understand. You weren't expecting my call. I'll be brief and let you get back to your day...*
- **Underhand:** *I totally understand. You weren't expecting my call. When would be a good time to talk about {benefit}?*

### **We don't have the budget**

- **Fastball:** *Pause... "that's not why I called", pause... go back into your pitch.*
- **Slowpitch:** *That makes sense; I have nothing to sell you today and was hoping to learn about what you're doing about {problem space}. Do you mind if I ask you a few questions?*
- **Cheeky:** *That makes sense; I have nothing to sell you today and was hoping to learn about what you're doing about {problem space}, if you answer a few questions, I'll stop bothering you ;). How does your team handle {problem space}?*

### **I'm not the right person**

- **Referral:** *Sorry about that, I must have got lost in your phone system; who handles {problem space} for your company?*
- **Fastball:** *That's why I called. Most {job title} I talk to are involved in the {problem space}. Could you tell me how you're handling X?*

### **I'm headed into a meeting**

- **Fastball:** *Understood; when is a good time for us to talk about your pipeline goals for this year?*
- **Slowpitch:** *Sorry about that. Would it be better if I called you back in an hour or same time tomorrow?*

### **Send me some information**

- *I'd be happy to. We have lots of documentation. Would you prefer a case study or one of our {best pieces of content}?*
  - However they answer, try and get them to elaborate on why a particular piece is important to them.
- *I'd be happy to. Would you mind telling me how your team is handling {problem space}?*

- *Happy to. But typically, when I hear that, what it means is you don't have time right now. When could we schedule a time when you're not so busy?*

#### **How did you get my name/number?**

- *Fair question. I work for a company that helps build outbound sales teams, and my job is to find leaders whose teams might benefit from what we do. So when I come across someone like you, I move mountains to get in touch with them. <insightful question>*

#### **I've never heard of you**

- *I hadn't heard about us either before I joined, but the more I learned about {your product} and how it's delivering {benefit} for customers like {case study customer}...*
- *{NAME}, I completely understand that you haven't heard of us. In fact, that's the same thing we heard from {reference customer}. However, they gave a rep like me a chance and have {received benefit}. I would love to help get your team the same results. {insightful question}.*

#### **We only do business a certain way**

- **Fastball:** *We are actually very flexible. We can work with any team, any way they want to work. We work with companies like X and Y, who have a similar situation as you, and we're producing {insert results} results for them.*
- **Slowpitch:** *Oh, that's super interesting; how did you arrive at that process?*

#### **We use a different special approach**

- *Great, so do many of our customers like {insert similar customers}.*
- **Slowpitch:** *Oh, that's super interesting; how did you arrive at that process?*

#### **I'm not looking for new solutions providers right now / not a priority.**

- **Fastball:** *Understood-- I'm not asking you to buy anything right now. Let's take some time to talk about how we're producing X results for customers like {insert similar customers}, and if at that point you feel the same way, we'll thank each other for our time and go on about our day.*
- **Slowpitch:** *I totally understand; most people I talk to aren't going to buy anything right now anyway. Do you mind if I ask a few questions now to see if it makes sense to follow up later or just leave you alone?*

#### **Call back in X months or X quarter.**

- *Happy to. Out of curiosity, what's going to change between now and then?*

#### **I have everything I need**

- **Fastball:** *That's great! So clearly, you're a forward thinker that invests in everything your team needs. We love people like you! Why not take a look at what we offer to make sure you have all the best options?*

- **Slowpitch:** *I totally understand; most people I talk to aren't going to buy anything right now anyway. Do you mind if I ask a few questions now to see if it makes sense to follow up later or just leave you alone?*

#### **I'm not the decision maker**

- **Fastball:** *Look {Prospect Name}, no one is going to have a better understanding of how a product /solution like ours could boost the results for your team more than you.*
- **Referral:** *Sorry about that; I must have gotten lost in your phone system; who handles {problem space} for your company?*
- **Sidestep:** *That's why I called. Most {job title} I talk to are involved in the {problem space}. Could you tell me how you're handling X?*

#### **I don't have the budget / it's too expensive**

- **Fastball:** *You weren't expecting my call, so I wouldn't expect you to have a budget. Most of our biggest customers started in this exact way.*
- **Slowpitch:** *I totally understand; most people I talk to aren't going to buy anything right now anyway. Do you mind if I ask a few questions now to see if it makes sense to follow up later or just leave you alone?*

#### **We already use X (non-competitive)**

- **Fastball:** *X Solutions are great for {what they're good for}. We're different in that we focus/specialize in {what problems you solve}.*
- **Slowpitch:** *I totally understand; most people I talk to aren't going to buy anything right now anyway. Do you mind if I ask a few questions now to see if it makes sense to follow up later or just leave you alone?*
- **Sidestep:** *Oh, interesting, I've heard they have good people, but their tool doesn't offer {your unique benefit}. Is that something that's ever bothered you?*

#### **We're already using one of your competitors**

- **Fastball:** *Many competitors do a fraction of what we do, and you may need to layer multiple solution providers on top of one another to accomplish a single outcome. Would you be interested to learn how our solution is different, as well as the benefits of a consolidated team?*
- **Slowpitch:** *I totally understand; most people I talk to aren't going to buy anything right now anyway. Do you mind if I ask a few questions now to see if it makes sense to follow up later or just leave you alone?*
- **Sidestep:** *Oh, interesting; I've heard they have good people, but their tool doesn't offer {your unique benefit}. Is that something that's ever bothered you?*

# How to Find Buying Triggers

A common method for finding buying triggers is the 3X3 (3 by 3) method, where the goal is to identify three relevant facts about the prospect or the company they work for within 3-5 minutes<sup>3</sup>. Think of buying triggers as hints that your prospect might be ready to buy right now. The more hints you can find, the more likely they're in-market for a solution like yours.

Buying triggers can be the basis for adding a prospect to a sequence, incorporated into your email messaging as personalization, or used as the trigger event in your cold call script.

The most important thing to identify is a "trigger event," which is something that makes your offering relevant to them right now. If you can't find a trigger event, then look for something that will make your email relevant to the prospect on a personal or professional level. Here are some examples of trigger events:

- When a new VP of Sales/CRO is hired, they tend to shake things up.
- When a company hires sales positions (AE/SDR), they tend to be in growth mode and are more open to other channels.
- When a company has been acquired by a PE firm, there are usually big changes in their revenue team.
- When someone from one of our customers moves to a new company.
- When one of your prospects changes jobs.
- When the company makes a big announcement like an IPO, fundraising event, new product launch, event they're attending, etc.
- Engaging with thought leader content on LinkedIn regarding growing revenue, generating leads, building an SDR team, etc.
- Following a relevant thought leader.
- Sharing/interacting with relevant content.
- End of the calendar year, most sales teams (but not all) will have a big push to hit their year-end goals. People start thinking about this around September.
- Also, near the end of the year, teams start planning out their forecast and spending for the following year. This can be a great time to reach out and see how their planning is going.

## Process

### 1. Look up the firm on LinkedIn

Rough look - do they have the number of employees on LinkedIn that we're looking for?

### 2. Visit their website

Does it look like they sell a differentiated product/service > \$20K ACV?

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<sup>3</sup> [Talking with Travis at SalesSource about how his 3X3 research method](#)

### **3. Check out case studies to make sure they're a legit company**

Find the CEO, VP of Sales, how many AEs they have, and how many SDRs they have on staff.

- Remember their names so you can reference them in the email.
- The counts of each job title will hint at how they've structured their sales team.
- Find out how much funding they (googled "CrunchBase Keywee") it was the first result.

Finding a compelling trigger event is the most effective way to tailor your messaging to a prospect.

## What Happens If a Prospect No-Shows

Sometimes people are busy, forget about the meeting, or get stuck on an important call. Sometimes, people only agreed to take a meeting to get you off the phone / to stop you from emailing them. How can you tell the difference?

On average, over 80% of your meetings should be showing up. We're dealing with small numbers, so it's normal if you're 70% one month and 90% the next; these are normal fluctuations in the data. However, if it's below 80% for a sustained period, then there are two areas to look at, your pitch and your targeting.

**To understand if it's your pitch, listen to your call recordings.**

- Are you steamrolling prospects into taking meetings that they don't really agree to?
- Do your prospects sound genuinely excited?
- Is it possible they're just saying yes to get you off the phone?
- Did they throw any objections that you haven't seen before?

**To understand if it's your targeting, look at the profiles of the prospects that no-showed.**

- How does their job title/seniority compare to your customers in similar verticals?
- How does their company (employees/rev/etc.) compare to customers?
- Are there any disqualifiers that you missed?

Your AE and sales manager can be a great source of feedback on the above.

Even if a prospect is a perfect fit, they can still no-show you. **Here's a process for handling that when it happens:**

1. At the time of the meeting, wait 5 minutes and then send them a follow-up / LinkedIn / phone call. *"Hi, Prospect - does this time still work for you?"*
2. Wait 30 minutes after the start time of the meeting and send a follow-up. *"Hi, Prospect - sorry we missed each other today. Would the same time tomorrow work better for you?"*

A cheeky move here (I did it as an AE, but your mileage may vary) is after you send them this follow-up, to change the meeting date to the same time tomorrow and see if they accept / decline.

3. Every morning until they tell you to fuck off, send them a different follow-up. Try varying the channel so you're not just sending an email daily. Use phone/social/email/carrier and pigeon if needed.
4. If they don't reply after five days (and ten follow-up actions from you), send them this email:

*“Hi Prospect - is this still a priority for you?” or “Hi Prospect - is solving X still a priority?”*

If they don't reply, add another buyer influence from their company back into your prospecting sequence.

Send them different follow-up emails weekly until they tell you to 'fuck off and die.'

# How to Prospect on LinkedIn

LinkedIn isn't the only social channel, but it's the most common one for SDRs. Some of the same ideas here may apply across other social channels with some channel-specific adjustments.

**Here is our process for building a strong LinkedIn presence:**

## Table stakes:

- A deep understanding of the problem you solve.
- Be intentional about what you put on your profile.

## Process:

- Build a list of your target accounts and prospects.
- Demonstrate an understanding of the problem space by creating content specifically for the platform.
- Find & engage in relevant conversations.
- Add and engage with your prospects.
- Ask for a meeting when appropriate.

## **Table stakes**

Many new SDRs have an understandable fear of sharing/engaging on social media. When I was a new sales rep, I had similar reservations and frequently held back from sharing whether I was at a conference or on-site with a customer. The more I learned, the more I realized that companies bought from my company because we (including myself) were experts in the problem space.

As a sales rep, I spent more time thinking and learning about the problems my company solved than my customers. Why? Nobody can be an expert in everything. Even a seasoned VP might have something to learn from an SDR that's only been on the job for six months.

As salespeople, we aim to understand the problem space, the friction points, and the common ways they are solved in the space. When it comes to social media, we salespeople just happen to be very niche domain experts on the problem we solve.

Did I get over my fear of sharing? I did, eventually.

I learned some simple math around how to size a generator, the factors that can alter the math, and a few gotchas to look out for (like battery backup systems don't love running on the power from a diesel generator). While they seemed insignificant to me, I was a simple sales rep and learned them quickly.



I discovered that my customers didn't have the time or capacity to go as deep into the problem space as I did. By going a little deeper than most reps, I suddenly became a resource for my prospects and customers. If I can figure out how to size a generator and watch out for harmonic loads, then I am confident that you'll be able to become a mini-expert in your problem space too.

We share, engage, and be helpful to get our name out there. In this context, your profile page is the new landing page and should be treated accordingly. The most important pieces to consider are your headline, about section, and pinned resources.

- Your headline should describe the problem space you work in (e.g., email subject line).
- Your about section should describe how you can be helpful (e.g., email body/CTA).

The CTA is implied with LinkedIn; if a prospect wants to get in touch, all they have to do is connect or send a message.

### **Build a list of your target accounts and prospects**

The best place to start is by building three lists in LinkedIn Sales Navigator, current customers, current prospects, and all prospects. The current prospects list is the most important if you have limited time.

Each list should include the companies, people that have bought from you (if any), and any individuals that might influence a decision about your offering.

- **Current customers** = a list of the companies that have purchased from you.
- **Current prospects** = a list of the companies you are currently pursuing in a sales development campaign.
- **All prospects** = a list of all companies that meet your ideal customer profile.

### **Create, share, and engage with relevant content**

Engaging intelligently on LinkedIn or any social media platform requires you to focus on your circle of competence, which is most likely the problem space in which your product exists. Fortunately, that's also where your potential customers need the most help.

Constantly sharing every piece of content your marketing team creates is not intelligent engagement; it's billboarding. This doesn't mean you should never share anything from your marketing team; they probably make some great stuff; just make sure it's not the primary thing you're engaging with.

Intelligent engagement starts with empathy for your customers and knowledge of the problem space. You then use that knowledge to find interesting content to share, answer people's questions about the problem space, and generally be helpful.

LinkedIn activity is very much a 'top-of-the-funnel' activity, meaning it won't likely turn directly into meetings immediately. Still, over time it will improve your conversion rates across the board.

Note that if you are sharing content on LinkedIn, the algorithm doesn't like it if you include an external link in the post. If you need to link to an external site, use the first comment to include the link.

If you're stuck on what types of content to share, a good ratio is ⅓ educational, ⅓ entertaining, ⅓ from your company (podcasts, blog posts, case studies, etc.). If you are sharing links, it's helpful to share a summary comment about it and include the link in a comment. This way, your summary is the 'platform-specific content,' and the link is your CTA.

### **Find & engage in relevant conversations**

Start with your list of current prospects in Sales Navigator and look for opportunities to be helpful, answer questions, and bring visibility to questions you can't answer (tag experts in your company that might be able to answer, then Slack them to make sure they respond quickly).

Tagging people is a really common way to generate more eyeballs on the content you're sharing or engaging with. A common tactic is creating a post and tagging people in the first comment.

### **Connect with your prospects on LinkedIn**

If you're not already adding them as part of a sequence/campaign, it's a great idea to slowly add the prospects you're pursuing to LinkedIn 2-3 within the same week (+/- a day). For example, if you're using the double tap (email/phone) method above, then adding a prospect to LinkedIn 2 days later is a great opportunity to get your name in front of them.

There is much debate on whether or not to include a note. We've run tests, and it doesn't seem to impact the acceptance or reply rates if you add a note to the connection request vs. waiting for them to accept and then sending the note. I prefer to do things once and find it much easier to add a note in the connection request.

### **Ask for a meeting only when appropriate**

The main focus of your engagement should be on being helpful and answering questions and not pitching your services or asking for meetings. Remember, this is a top-of-the-funnel activity, and your goal is to earn some name recognition, so when you email them in 6 months, they have a higher chance of replying.

If you are going to send notes along with your connection requests, please avoid asking for the meeting. Your goal is to establish a connection with the prospect. Asking for a meeting before you understand if your product is relevant to them and if they're in the market, is a great way to get yourself into the "Other" conversations section.

## **Mining for Gold in Your CRM**

There are opportunities in your CRM that are being missed. No CRM is perfect; whether it's because of turnover, bad processes, or changes in your offering, the result is often the same - prospects are hiding in your CRM that are one or two touches away from being a solid opportunity.

Mining for gold in your CRM can be a creative way for an SDR to supplement their quota-driving initiatives. That being said, there are rules of engagement that need to be considered before jumping on any and all leads in your CRM.

The first thing that needs to be done is to understand your internal team's account/prospect/client management. You will need to work collaboratively with your direct manager around any type of campaign here. The role of an SDR is not to audit these processes but to get clarity around what they are - the result of this will be that each account/prospect/client in your CRM will be utilized to its maximum potential.

Once you understand the processes in place, you need to understand how those processes interact with your CRM and SEP. Become familiar with your CRM and your CRM reporting. Many organizations will have dedicated resources in revenue operations, but that doesn't need to stop you.

The reality is that you, as an SDR, will better understand the accounts/prospects/client journey - most of which your ops team members will not have. If there are limitations in what you can do in terms of your CRM/SEP usage, build a relationship with someone internally that can work with you to get the necessary reporting.

### **Attacking old Inbound/Outbound prospects**

Identify a group of prospects who have not been contacted in the last 12 months. Remove any prospects with a 'Do Not Contact' status or already owned by someone in your organization.

The remaining prospects will need to be enriched with up-to-date data. When pursuing these prospects, it is imperative to reach out with an update and/or some additional value that did not exist when your organization last interacted with the prospect.

Whether it be a new offering or great content, simply reaching out to reconnect without any reason will likely not produce positive results. Some of your best opportunities will be with 'self-referrals.' These are instances where the prospect has moved on to a different organization - a perfect opportunity for you to reference your previous outreach with said individual where you are now looking for the right person to continue the conversation.

Check-in with your AE(s). Account Executives are closers. They will do everything that they can to generate revenue in the most efficient way possible. Due to that pursuit, it is often the case

where they deprioritize the nurturing of their accounts - a perfect place for an SDR to step in to assist. Take the initiative to connect with your AE to learn about some opportunities they might be dropping the ball on.

### **Marketing Leads**

There are often situations where marketing sits on gold (in the eyes of an SDR) without even knowing it. So connect with your marketing team - understand their audience and how they interact with the business. You might just find prospects that are being missed or going unnoticed.

### **Old Clients (Churned)**

Get clarity from your account management department around how old clients get funneled back to the sales side - or if they do at all. In many cases, there will be hesitancy to reach out to churned clients, especially if they had a poor experience.

There will be a group of past clients that are complete 'no-fly zones' though most will be willing to re-engage with you. Account managers are not sales representatives, so it is important to take back control of the relationship with the account. This takes buy-in across multiple departments but are welcomed conversations.

The key piece here, before performing any outreach to old clients, is getting a clear sense of the previous engagement. Understand what worked and didn't so you are well-equipped to further the relationship.

### **Make Mining Redundant**

If you are nurturing your prospects effectively, there should be no missed opportunity in your CRM. As an SDR, you need to ensure you are not losing sight of your owned prospects. With SEPs layered over CRMs, no lack of tech support will allow you to do this. Stay organized, don't get behind on tasks, and you will utilize each account/prospect to its maximum potential.

# Old stuff - some might be useful

## Skills development

How to identify a good Account

How to identify a good Prospect

How to talk about the company and how we help customers

How to book a great meeting (right fit + excited)

[Handoff to AE](#)

[How to avoid happy ears with Jon Parisi](#)

How to organize your day

[Ryan Reisert's bucket system](#)

GPT-Draft: [Lesson Plan: How to Organize Your Day as a Sales Development Rep ...](#)

How to build a sequence

📺 Everything you know about building sequences / cadences is wrong

How to use cold email

How to write an email (101)

[Quality over quantity with Matt Amundson](#)

GPT-Draft:

[Lesson Plan: Why Quality is More Important than Quantity When it ...](#)

[Jake Biskar - looking for buying triggers \(in the podcast not blog post\)](#)

[Cold email mindset with Jed Mahrle](#)

[How Alex Palomino gets strong reply rates](#)

📺 Fix Your Sales Sequences to Increase Conversions

📺 How to Write Sales Emails That Convert II

How to personalize an email (201)

[Michael Tuso - personalized touches that drive 80% of opps](#)

GPT-Draft:

[Lesson Plan: Personalizing Cold Emails for Sales Development Re...](#)

[Why relevant is more important than personal](#)

How to find buying triggers for personalization (301)

[Podcast with Sarah on Midbound](#)

How to write CTAs

📺 How To Write The Perfect CTA For Your Sales Emails

How to use the phone

Cold call scripts and openers (101)

[Steve Ross blog post](#)

[Jason Bay's framework](#)

[The anatomy of a cold call](#)

How to handle objections (201)

[Outreach Toolkit](#)

[Stream with Sarah and David Premier](#)

[Handling objections with Jason Bay](#)

[How to uncover pain / qualify \(301\)](#)

[Mark Kosoglow blog post](#)

How to use social media

[How to integrate LinkedIn messages / InMail into a sequence \(101\)](#)

[LinkedIn basics with Tom Abbott @ Soco Selling](#)

[Social selling basics and podcast](#)

[Create a strong LinkedIn profile](#)

[How to research and personalize your outreach using LinkedIn and other social \(201\)](#)

[Livestream with Brandon](#)

[▶ How To Find New Customers on LinkedIn: 3 Easy Steps](#)

[How to identify buying triggers and intent signals on LinkedIn \(301\)](#)

[Stats and KPS you are responsible for and how to find / monitor them](#)

[Activity goals \(daily/weekly/monthly\)](#)

[Output goals \(meetings/pipeline/etc...\)](#)

[How to prepare for a meeting you booked](#)

[What a good discovery call looks like](#)

[How to follow up on a meeting](#)

## Things to do

### Listen and watch

[Watch N discovery call recordings](#)

[Sit in on N discovery calls \(with AE team\)](#)

[Sit in on N late stage calls \(with AE team\)](#)

[Review and score N discovery call recordings](#)

[Review and score N cold call recordings](#)

### Role Playing

[Cold call opener roleplay](#)

[Cold call objection roleplay](#)

### Create

[Interview a client / listen to a call recording, do some research, and write a case study](#)

[Email writing case study - review case study and create messaging](#)