

NEW BUSINESS DEVELOPMENT & SALES · TEMPLATE

SDR Operating Kit

For sales leaders setting up or resetting an SDR function so that booked meetings become accepted meetings and real opportunities.

How to use this: Agree the acceptance criteria and rejection reasons with SDRs and account executives together. Use the handoff note for every meeting, the funnel review every week and the ramp plan for every new hire.

Readiness Check

SDRs scale a motion that already works. Tick what is true today.

- ☐ We have an ideal customer profile built from real customers, with clear disqualifiers
- ☐ Someone has already booked and run meetings with a message that works, and can show an SDR what good looks like
- ☐ There are enough target accounts to keep an SDR busy for a year without recycling the list
- ☐ Account executives or the founder have capacity to take more first meetings and follow them up
- ☐ A manager will spend real time each week coaching and reviewing meeting quality

If any box is unticked, what will we do first?

Meeting Acceptance Criteria

What has to be true for a meeting to count.

Criterion	Our definition	Agreed by
Right account		
Right person		
A real reason to meet		
Agreed agenda		
Calendar accepted		

Rejection Reasons

Account executives accept or reject every held meeting within one working day, choosing one reason.

Reason	What it means for us	Count this month
Wrong account		
Wrong person		
No confirmed problem		
No-show		
Existing opportunity or duplicate		
Other (should be rare)		

SDR to AE Handoff Note

Complete before the meeting. Five minutes is enough.

Account, tier and meeting date

Why this account: profile fit

Why now: the signal or trigger

What they said, in their own words

Who else is involved, and will they attend?

What we told them the meeting would cover

Open questions for the account executive to ask

Weekly Funnel Review

Track each step separately. Build your own baseline over six to eight weeks.

Step	This week	Last week	4-week average	Note
Activities				
Conversations				
Meetings booked				
Meetings held				
Meetings accepted				
Opportunities created				
Pipeline value created				

Where is the biggest leak this week, and what is the likely cause?

What will we change before next week?

Weekly One-to-One Agenda

Around thirty minutes. Review real work, not just numbers.

Segment	Minutes	Notes
Funnel numbers for the week	5	
Two call recordings or email threads reviewed together	15	
One skill to work on before next week	5	
Blockers and support needed	5	

Coaching Log

One line per week, so progress is visible over time.

Date	Skill focus	Evidence of progress

90-Day Ramp Plan

Write it before the person starts. Review it with them at day 30 and day 60.

Phase	Focus	Goals for this person	Review date
Days 1 to 30: learn	Profile and disqualifiers, the problem in buyer language, competitors. Listen to calls, shadow meetings, write sequences for review.		
Days 31 to 60: run	Own a defined set of tiered accounts. Agreed activity and conversation levels. First meetings against the criteria.		
Days 61 to 90: produce	Work toward the full target for held and accepted meetings on a stepped quota.		