freshworks

Handbook

SDR Essential Handbook to Keep Your Sales Pipeline Brimming

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We get it. You have just started out as a sales development rep, and you want to make an impact. But you are also overwhelmed with the amount of planning, researching, and follow-ups that snowball into your task list in a day.

This handbook has everything you are looking for to make your work life a little easier, including actionable tips and valuable templates.

Building Essential SDR Skills

As an SDR, you are the crucial thread that weaves together prospects with the company. But in order to get that crucial first discussion, you have to shoulder a lot of responsibilities.

You know the drill. A day in your life involves prospecting, building an account strategy, planning outreach, defining the messaging, and executing a sales cadence that involves calls, emails, and social touchpoints.

But how do you set yourself apart from peers and get the best leads that convert? Here are skills you can develop on your job and steps you can take on a daily basis that will help you achieve your goals:

CHAPTER ONE

Learn about the product

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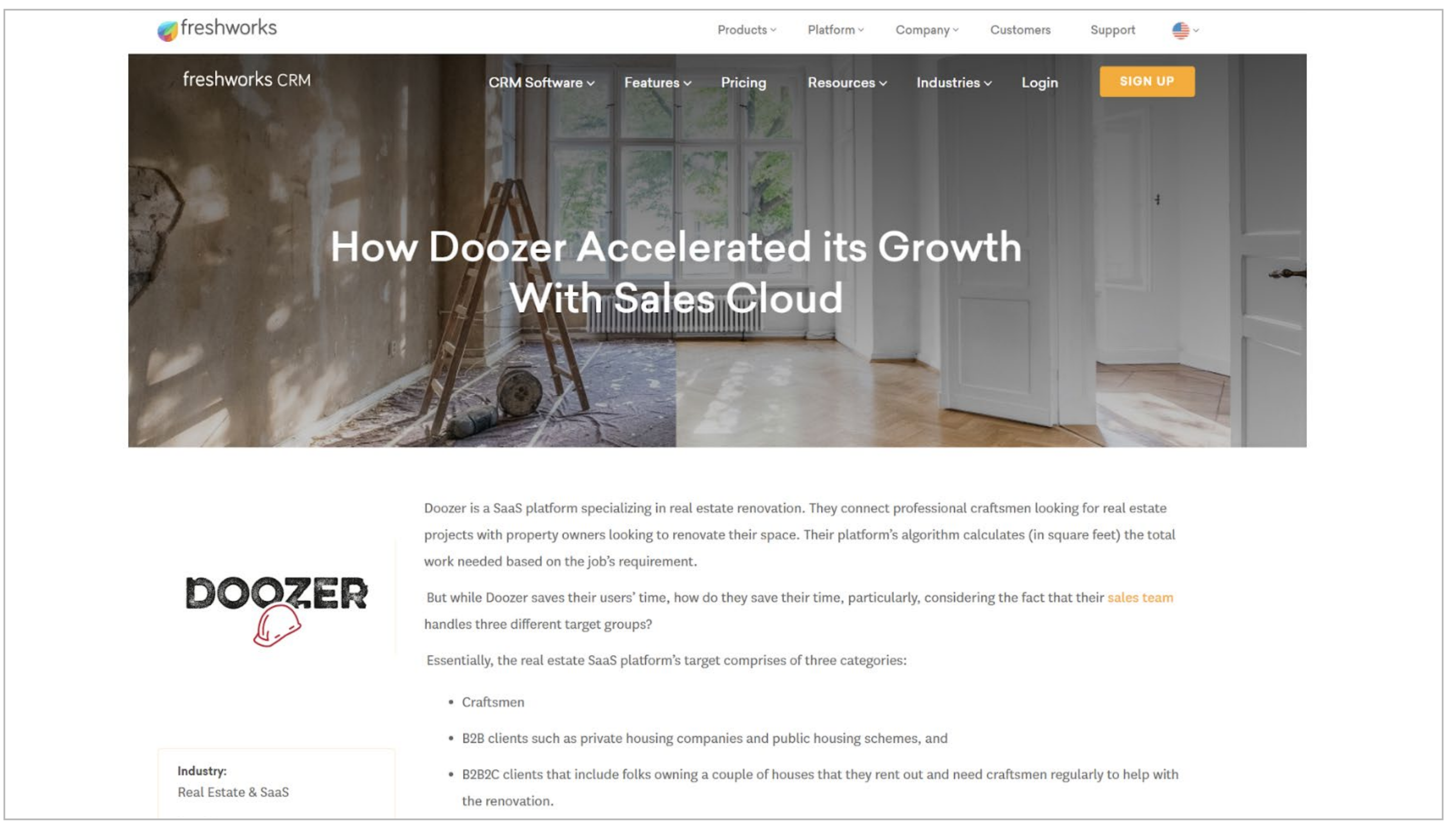
Knowledge is power, especially in the world of sales.

Probably the most overlooked task for an SDR is to completely understand the product, take up training, and read up on the technical nitty-gritties of the product before understanding who it would best benefit.

So, where do you head to while prepping yourself?

> The website is the best place to get as much information as possible, to understand features, use cases and case studies. Signing up for the product and exploring the look and feel of it strengthens the understanding as well as applying it to real-life challenges.

Sahana Sekhar
Sales Development Rep, **Freshworks**



How do you learn about the product?

- Try out the product: First things first. Trying out the product is the best way to learn about it and find its benefits and features. Become familiar with the product by signing up for it (if it is an online software) or get a sample and go through the same process that a potential customer would. Was it easy to understand at first glance? Did it seem overwhelming? Take notes, and speak to your development team.

- Get the basics right: Some products can be really hard to understand, especially if you do not have a background in that industry. But customers do not expect you to know all the technical specifications. If you know the basics and can point them in the right direction, they will be happy with that, too. So, read up and try out the product to get your basics right.

- Problems it solves: More often than not, prospects see you as a consultant and a problem solver. So, if you understand what problem your product solves, then you will understand how your product can be customized to suit the needs of the prospect.

- Lean on resources: Almost every organization has a sales playbook that will help with product offerings, case studies, and more. You can also take up courses in your industry/domain to widen your knowledge because sometimes you need to know how the prospect's industry works to hold a conversation with them.

Here are some free courses you can take up:

- Introduction to sales development
- SDR best prospecting practice
- Conversational sales

Some of the best ways to learn about the product are:

Product Workshops	**Case Studies**	**Asking senior salespeople questions**	**Company website**	**Product training material**

Prepare a Value Dashboard

Having information at the top of mind is one of the most important roles of an SDR. Why so?

- **You can handle objections better**
  Whether it's about the price or a comparison to a competitor, knowing about your own product price points and benefits always helps you answer questions from prospects better.

- **You keep learning and discovering additional advantages to offer your prospects**
  You could discover hidden uses and articulate them better to your prospect.

- **You understand competition better**
  Where does your product fare better- is it value, price, features, or all of the above?

- **You gain more confidence**
  If you know more about the product, you'll be more than prepared for any situation that comes to you.

But how do you keep track of so much information about your product or company?

While you are in this stage of learning about the product, you can fill out the below sheet to have information at your fingertips and you can infinite number of times later.

Quick Facts	
Pain point the product solves	
Pricing list	
Top 5 features	
USPs	
Ideal Customer Profile	
No. of customers - Free and Premium	
Top clients who've used them	

CHAPTER TWO

Research about the prospect

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Since you have to identify and initiate contact with prospects, you have to know them as much as possible before you take the first step.

Some of the best ways to research about your prospect are:

1 LinkedIn

Most prospects, amid their busy schedule, check their email or scroll through LinkedIn during work hours, so there are lots of opportunities to get information online and reach out.

LinkedIn is a business platform that can help you get information easily like name, roles and responsibilities, locations, interests, and activities of the prospect.

LinkedIn Sales Navigator allows sales teams to engage with contacts and accounts within the LinkedIn platform. In simpler terms, Sales Navigator is a social selling platform by LinkedIn that provides an array of features that focus on helping you find the right prospects to build trusted relationships. With LinkedIn Sales Navigator, you can reach the right kind of prospects by using the search and filter features.

2 Hierarchy map

Speak to different people in the prospect's organization to understand who holds authority and who the gatekeepers are. Creating this mental map of the hierarchy, can also save you a lot of time while reaching out to prospects.

3 Publicly available information

Latest press releases or news websites can also help you get information about investments, mergers, focus areas, role changes, etc within the prospect's company.

4 Engagement

If you have a CRM in your company, then it is easy to track past engagements of the prospect with your company. A CRM software helps sort your leads into hot, cold, and warm leads and can be a great addition to your tool kit as you don't have to look for signs of a sale manually.

A CRM software also helps you track engagement metrics like:

- Email clicks
- Email replies
- Form filled on your website
- Any downloadables they are interested in

The end goal of this exercise is to understand your buyer persona and where you can find them.

CHAPTER THREE

Qualifying prospects

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According to a study, only 36% of a sales rep's time is actually spent on selling. In fact, administrative tasks are responsible for 14.8% of the effectiveness drain. This is where qualification can play a role.

With the little time you have to sell, you don't have to expend a lot of energy talking to multiple prospects at the same time. Qualification helps you narrow down on leads who are most likely to convert.

By qualifying leads, you can focus on talking to the right people by ensuring they have a definite need for your product/service and not waste time chasing the wrong leads.

Qualification methods

1 BANT

This is a well-oiled sales qualification method. It has also been commonly referred to as a sales qualification process or framework.

Budget	Authority	Need	Timeline
How much is the prospect able and willing to spend? Some customers may simply be unable to afford your product.	Who has the ultimate authority to buy or is the key decision-maker?	Does the prospect have a problem we can solve, or how does our solution enhance their business?	In what timeframe do they need the solution? This is all about establishing urgency. You may ask your customer, *'How soon do you want this problem resolved?'*

Download this sample BANT questionnaire you can use while qualifying your prospect.

2 Challenger Selling

This concept, coined by Matthew Dixon is quite popular in the sales world. A salesperson who has a challenger personality:

- Pushes prospects to think by debating and asking questions
- Has a stronghold on product knowledge
- Has a different worldview

3 SNAP Selling

Another well-known sales qualification method that comes in handy. With Snap selling, you make it easy for the prospect to purchase from you, share invaluable information that they cannot get elsewhere, and appeal to their innate beliefs.

Simple	INvaluable	Align	Priority
Make it easy for prospects to open their mind, alter their current habits, and adopt what you're selling.	Prospects are most likely overwhelmed with the choices available both online and offline. Be the problem solvers, and share the value of your product.	Every prospect has an innate belief and unique needs. Align your positioning statement with these beliefs and needs.	Focus on what the prospect is focused on to win deals.

Qualifying questions

If you are worried about your technical knowledge of an evolving product, you can still make a good impression in the prospect's mind by asking the right questions.

What do qualifying questions help achieve?

- Makes the prospect think in the direction you want them to
- Give you enough information to understand their problems
- Gives you context to see if your product will solve their problems

Qualification questions examples

Some of the qualifying questions that are universal and you can use in your conversation with prospects include:

What are the results you want to achieve?
How do you want to achieve them?
How does your sales cycle currently work?
What are your current challenges?
What are your current channels of engagement?
Could you help me understand the team structure in your organization?
What are the current challenges that are leading you to explore a new tool?
Which features are must-have versus nice-to-have?
How does your company make decisions?

CHAPTER FOUR

Reach out to prospects

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Personalize emails

Emails are becoming an indispensable form of communication with prospects. In fact, personalized emails deliver 6x higher transactional rates.

Track responses to your emails

How do you know if your prospects clicked on your email or if it was wiped away with CTRL + A + Delete?

Email tracking has become a crucial part of reaching prospects and customers — old and new — at every scale. Using a CRM with email tracking capabilities has become all the more essential for SDRs to reach out to their prospects at the right time and with the right context.

With email tracking, you can:

- **Engage with context**
  For example, if your prospects have clicked on a case study or demo link that you shared in the email, you know how to steer your next conversation with them.

- **Increase sales productivity**
  By reaching out to prospects when they are sales-ready, you can save time on follow-ups. Apart from that, you can even automate follow-up responses based on your prospect's behavior on email.

- **Get data-driven insights**
  Make use of insights like email opens, email clicks, and email replies, and review the results so you can craft email templates accordingly.

Free templates

1 Cold Call Opening Lines Template

Most times, SDRs are in a rush to pitch, worrying whether the prospect has time to attend the call or will ignore it just like other times. But when they do pick up and make time for you, how do you make that impact in a few words?

Here are ready-to-use cold call opening lines:

Establish credibility

"I have worked with leaders like you from the retail industry on streamlining their IT processes, and some of our customers from the Retail industry are Customer 1 & Customer 2".

Build a connection

"Hey XYZ, I came across your LinkedIn profile. It's great to see you drive customer experience initiatives. We work with A/B/C in automating their customer support processes and driving agent productivity. I'm curious to understand your current priorities and see if our synergies meet."

Have a strong introduction

"I really appreciate your time, John. I'm a Business Development Executive at <company name> assisting businesses to solve challenges related to <a major industry challenge>."

Lead the call

"I have helped <competitors'> to improve their <industry metric (eg: sales processes)>. Most businesses are finding it incredibly challenging to <industry specific challenges>. Does that sound like you?"

What's in it for them?

"I just wanted to check if you are available to try out a product that can help you improve your lead conversions by x%?"

2 VoiceMail Scripts

Prospects are busy all the time. They don't want to be intruded in the middle of their working hours. But your quarterly goals cannot be kept waiting. So, how do you make your voice heard? Voicemails are the key to reaching out to busy prospects. Keep it crisp, informative, engaging, and share how they can reach out to you if they are interested. How, you ask? We tell you below:

The Don'ts

Selling Your Product

"Hi George, this is James calling from Freshworks. I'm calling you today with an excellent offer from our company. For so many years, spreadsheets and other inferior products have occupied the contact management space. Today, we're so proud to launch our product that breaks all barriers and lets salespeople just sell. Our product is called XCRM and…"

Leaving an Overly-Long Voicemail

"Hey George, how are you? So, yeah, I just wanted to check in with you regarding a module you're using currently and if you have any questions, I'm happy to help you out in any way I can. Also, your contract expires in November, so we have plenty of time to discuss how we can take this forward. I just wanted to give you an update on that. Just before your expiration, you'll have a lot of options to renew your subscription and I can offer you a good discount to help you save some money. So yeah, please connect with me as soon as you can! Have a great day! Bye."

Talking About Irrelevant Information

"Hi George, this is Thomas with Freshworks.
I'd like to follow up on something... um I spoke to you earlier about our product... I hope you had a chance to go through the deck... um, if you have any questions or requests to ask or you need implementations to be done… we have some possibilities, and um, I'm available from 9 am to 6 pm. So, anyway, this is George with Freshworks and… um, I'll try reaching you again sometime soon! Thanks!"

Sounding Desperate

"Hi, Kate. This is Thomas with Freshworks. We're running a campaign next week regarding our product and I'd love to have a salesperson in your area to give you more context. I'm eagerly looking forward to hearing from you. Kindly give me a call at your earliest convenience."

Best Practices

How You Should Be Leaving Your Phone Number

"Hey, Ash, this is Thomas. I wanted to reach out to you to discuss further any questions you might have about our product so I can help you evaluate it. Let me know when we can connect. Reach out to me at 855-747-6767. That is 855-747-6767. Or, drop me an email at thomas@xx.com. I will be sending you an email shortly so you can respond to that. Looking forward to hearing back from you, Ash!"

The Different Methods

The Lever Method

"Hi, George. This is Thomas with Freshworks. I have been working closely with you and your team down at xx Inc. for the last year and a half. Something has just come across my desk, and I'd appreciate it if we could chat briefly. Please reach me at <phone number>. Again, this is Thomas with Freshworks at <phone number>."

"Hi George, this is Thomas calling you from Freshworks. We spoke on the 2nd of February, 2020, regarding the features available under the Pro plan in our product. I'm calling you to find out if you've received all the details from our product experts and if I can assist you with anything else. Do reach out to me at <phone number>. That's <phone number>."

The 'Presenting a Value' Method

"Hey George, this is Thomas. I thought of catching up with you because a wonderful opportunity has come across my desk that has helped businesses experience a 20% growth in sales. I thought of you immediately for this, so if you could give me a call to learn more about this at <phone number>, that'd be great. That's <phone number>. Thank you!"

The 'Urgency' Method

"Hey, George! This is Thomas calling you from Freshworks. I've been trying to reach you for a long time, and it'd be great if we could connect by EOD. Do call me at <phone number>. That's <phone number>. Please call me back soon."

The 'Combo' Method

"Hi, George. This is Thomas with Freshworks. I have been working closely with you and your team down at xx Inc. for the last year and a half. Something has just come across my desk, George, that has already helped teams in companies experience a 20% growth in sales. Again, this is Thomas with Freshworks, and you can reach me at <phone number>.

3 Cold Email Templates

Simply sending out a generic cold email to your list of prospects is bound to bring poor results because they cannot relate to what you have written. Cold email templates are a hard nut to crack because the average open rates vary only between 15.22 and 28.46% across different industries. Therefore, personalization is the key to standing out in B2B sales.

So, we have compiled a list of B2B cold email templates that you can use for your email campaigns to improve your open rates and hook more customers.

A Value proposition cold email

Take a sneak peek into a cold email that Sahana Sekar, Sales Development Representative at Freshworks, uses:

To:

Cc:

Subject:

From: Signature: None

Hi,

Hope you are doing well! Given your focus on customer experience, I figured you would know if there are any service desk solution initiatives slated for this year.

Freshdesk is a Gartner Magic Quadrant featured Customer Support solution, helping clients like Decathlon, BookMyShow, PhonePe, and Practo consolidate support channels (email, phone, chat, social media, tickets) to improve communication across customer-facing teams (customer service, operations, sales, shared services).

Value propositions for working with us:

- Configuration v/s customization - No code platform, drag and drop environment
- Quicker time to value - Out of the box solution, average implementation time of ~8 weeks
- Partnership Model - Implementation team, dedicated CSMs, 24/7 email, and 24/5 call/chat support

Do you have 10 minutes to discuss your initiatives?

Sincerely and with optimism,

(Your Name)

Template:

Hi **(Prospect Name),**

Hope you are doing well! Given your focus on **(industry expertise),** figured you would know if there are any **(your product specific)** initiatives slated for this year?

(Your product) is a **(mention industry recognition),** helping clients like **(your biggest clients)** consolidate support channels to improve communication across **(relevant teams or your product benefits).**

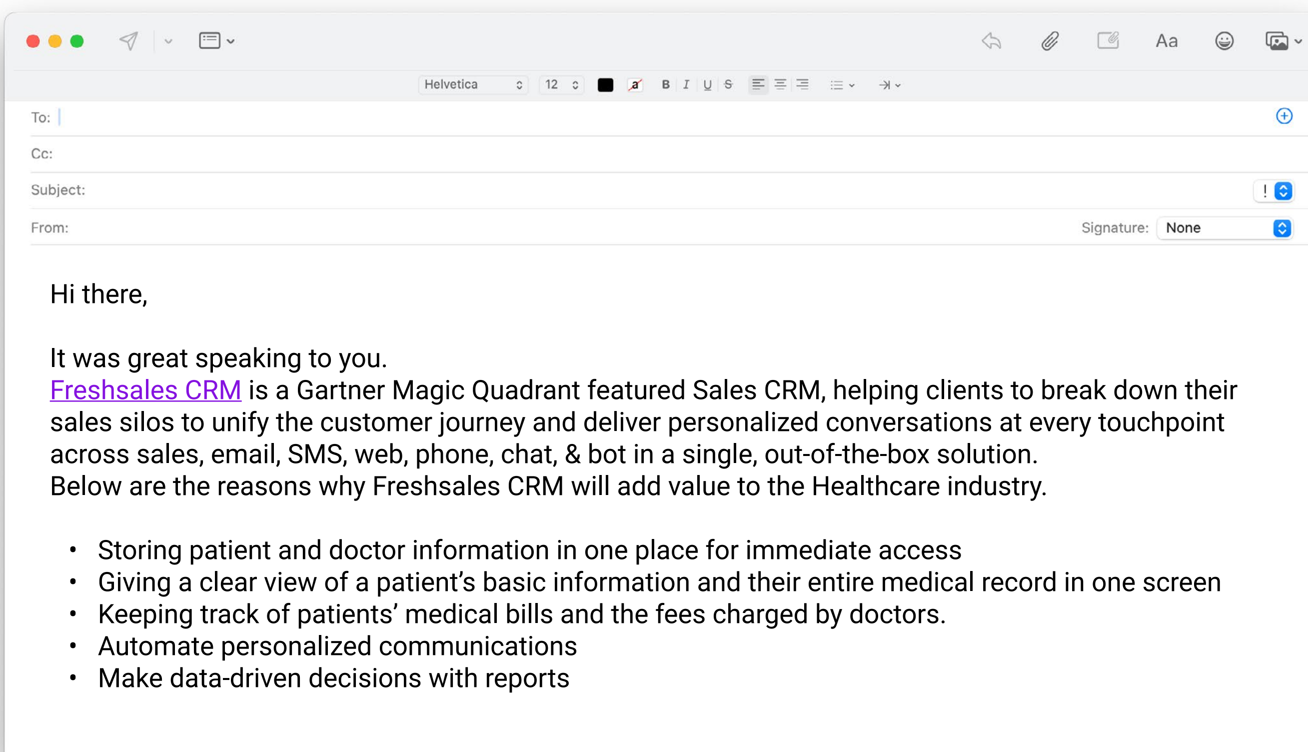
Value propositions for working with us:
(mention 3 value propositions)

Do you have 10 minutes to discuss your initiatives?

Sincerely and with optimism,
(Your Name)

B Industry-specific cold email

Take a look at this cold email from Chaitanya Balaraju, Sales Development Representative, Freshworks:



Hi there,

It was great speaking to you.
Freshsales CRM is a Gartner Magic Quadrant featured Sales CRM, helping clients to break down their sales silos to unify the customer journey and deliver personalized conversations at every touchpoint across sales, email, SMS, web, phone, chat, & bot in a single, out-of-the-box solution.
Below are the reasons why Freshsales CRM will add value to the Healthcare industry.

- Storing patient and doctor information in one place for immediate access
- Giving a clear view of a patient's basic information and their entire medical record in one screen
- Keeping track of patients' medical bills and the fees charged by doctors.
- Automate personalized communications
- Make data-driven decisions with reports

Template:

Hi (Prospect name),

It was great speaking to you.
(Your product and industry recognition), helping clients to(mention product benefits, clients it has benefited etc)
Below are the reasons on why **(your product)** will add value to **(prospect's industry).**

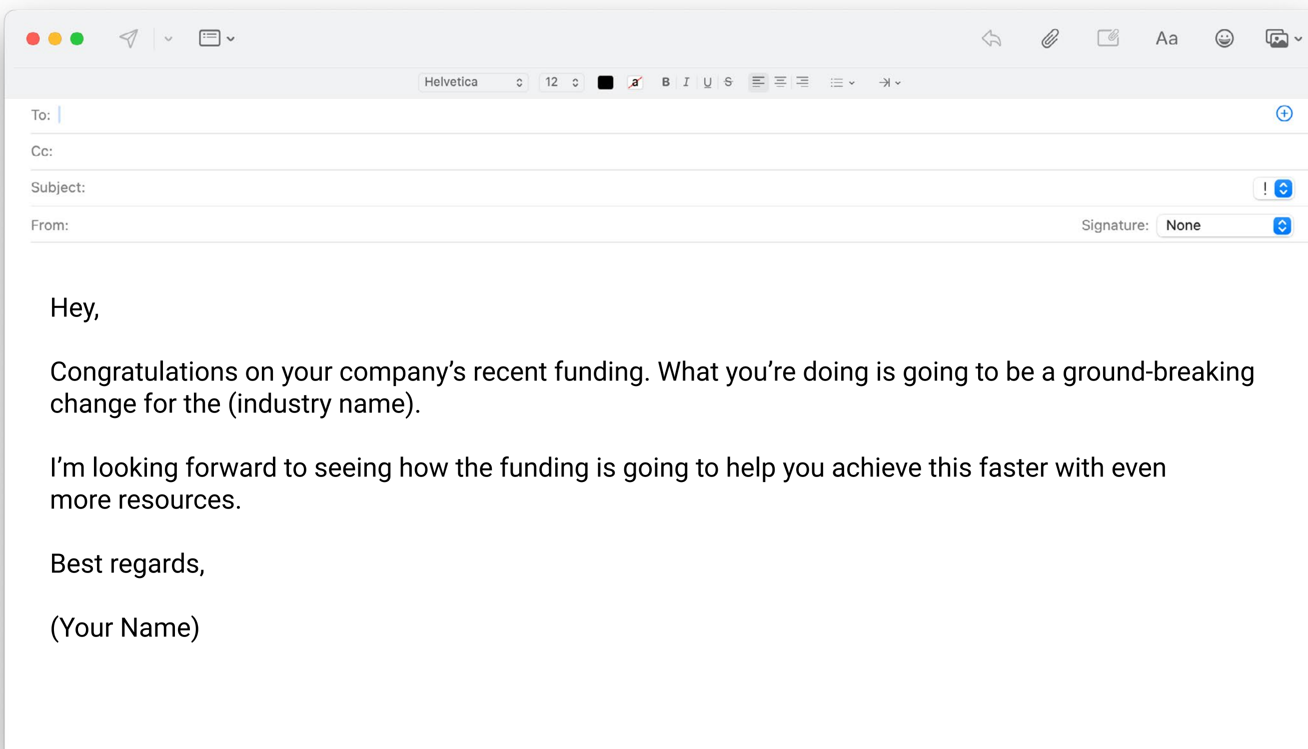
- **(Mention 5 industry-specific benefits)**

Please look **(your website link)** for the details on **(product benefits for that industry).** I look forward to your response.

Regards,
(Your name)

C Congratulatory prospecting email

Take a look at this cold email from Chaitanya Balaraju, Sales Development Representative, Freshworks:



D Personalizing emails to decision-makers

To:

Cc:

Subject:

From: Signature: None

Hi,

I am reaching out to you because, being the (recipient's current role), I was certain you would know more about the current process in place at your company for (which department).

Like we've helped (your existing customer), I felt you might be interested in improving your (the biggest challenge for the prospect).

I did a fair amount of research on your company's (current system), and I'm sharing a few of my thoughts here, which could help you save (the benefit your product offers):

(screenshot of their web page)

1. I noticed that (state the current problem and how it can be better)
2. (state another problem and how it can be better)

I'd love to share a few more ideas with you and spend more time understanding your current process.

(Prospect-Name), could we spend 15 mins this week to chat about this?

Regards,

(Your Name)

E Building credibility with social proof

To:

Cc:

Subject:

From: Signature: None

Hi,

My name is (salesperson's name), and I am the (designation) for (your company name) in the (region of the prospect). (a sentence about what your company does) (customer 1, 2, 3) have all moved to (your product) in Q3 to help with:

1. (benefit 1)
2. (benefit 2)
3. (benefit 3)

And much more.

I would love to get on a short call with you for a quick review of your current systems and how we can help.

Regards,

(Your Name)

4 Sales Cadence Templates

While you may have the best cold email templates and make calls according to your instinct, it still makes business sense to send out messages to the prospect across different channels in a consistent manner.

Sending out an email and calling them multiple times will only anger the prospect, and they may not be open to receiving your message. Following a sales cadence to reach out to a prospect or a group of prospects from one company will yield a better result as you are not bombarding them with information but sending it out in a phased manner.

A The methodical approach

This four-week sales cadence works best for a long sales cycle and large deal value — ideal for outbound sales reps pursuing mid-market organizations:

Day/Date	Platform
Day 1	Email
Day 3	LinkedIn message Email
Day 7	Email
Day 10	Call Text Message
Day 15	Email LinkedIn Message
Day 17	Call Voicemail Email
Day 20	LinkedIn Text Message Call
Day 25	Call Voicemail Email
Day 30	Call Email

B The email-only cadence for SMBs

This is an email-only sales cadence for the SMB market. It can be used for short sales cycles with a small deal size:

Day/Date	Platform
Day 1	Email
Day 3	Follow-up email
Day 6	Email with case studies
Day 8	Email with value-adds of your product/service
Day 11	Follow-up email
Day 14	Breakup email

C The top-down cadence

This three-week cadence is designed to approach prospects of different hierarchical levels in the target organization:

Day/Date	Platform
Day 1	Personalized email to the CEO
Day 3	A new email thread about your product/service
Day 8	Follow-up email
Day 10	Call Voicemail Email
Day 13	A new email thread with customized presentation/video
Day 16	Follow-up email
Day 18	Email to mid-level Executive
Day 20	Follow-up email
Day 22	Call Voicemail Email
Day 25	Email to lower-level executive
Day 26	Call Voicemail Email

5 Follow-up Email Templates

According to a study, 60% of customers say no four times before saying yes, whereas 48% of salespeople never even make a single follow-up attempt. This throws the spotlight on follow-ups. All the more reason for you to not just send out an email and forget to follow-up, but to follow up in a phased manner. Here are some quick follow-up templates for when you are in a rush.

A Quick follow-up email

Hi,

I'm writing this email to follow up on my previous one, as I haven't heard back from you.

I'd love to have a quick conversation with you sometime soon. Let me know how we can take this forward.

It'd also be awesome if you could connect me with the most appropriate person for me to talk to regarding this.

Thanks and regards,

(Your Name)

B Closing their record

Hi,

Just following up with you with regard to the email I sent you a couple of weeks ago.

Since I haven't heard from you in some time, I assume that you are busy or not interested. If you aren't interested, can I go ahead and close your record?

If you are interested, then awesome. How can we take this forward?

Thanks,

(Your Name)

CONCLUSION

Final Takeaways: SDR Dos and Don’ts

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Dos

Follow one sales cadence

Spend time developing a sales cadence like the following:
Cold email -> Cold call -> Follow up email -> Follow up call -> Discovery/Nurture. Follow this religiously and customize it for different prospects.

Remain consistent with a sales cadence until you get enough inputs to tweak it.

Accumulate as much information as possible about your prospects before changing your sales cadence.

Send out an email followed by calls

To ensure your email doesn't get buried under 100 promotional emails that a lead receives from different brands, make a quick call to check if they received it.

Connect on LinkedIn

Keep a few high-quality prospects on your radar on LinkedIn and engage often with their posts. This way, they will get familiar with your name. You can also share witty inMail or share valued resources for free through a LinkedIn message.

Personalize your engagement

Irrespective of the platform, never copy-paste your template and share it with your leads. Personalize each email, each phone conversation, and each LinkedIn message according to the geography, preferences, and role of the leads. Here are more resources to personalize your engagement with leads. Here are also some tips to personalize bulk emails.

Build a rapport with prospects

Always go beyond the sale. Don't let the pressure of sales linger in your conversations. Make a friend in your prospect who can rely on you to meet their goals.

Focus on having 2 good conversations every day

You don't have to hit it off from the first phone call but focus on having good conversations with at least two prospects from the 30-40 you would reach out to in a day. Take small steps when you approach leads. Don't let the pressure of meeting your goals get to you, and focus on building a long-term reliable relationship and not a quick-second sale.

Don’ts

Go after the wrong persona

Just because you need to hit your quarterly targets, you chase after leads who don’t respond to you, value your time or are just not interested in your product, then you ultimately delay your targets. If you see the right signs, like email clicks, ebook downloads, positive conversations, etc, then pursue those leads.

Delay your response

Leads do not like to wait for too long. They will just move on to your competitor. So don’t push your responses for the next day. Reply as soon as you see their response.

Disturb if your prospect is on DND

Prospects who are on DND really value their privacy. So don’t overstep that boundary to make a sale.

Send long emails

According to a study of over 40 million emails, 51% of emails with **75 – 100** words had the highest response rate. Shorter emails are also mobile-friendly. So keep your emails succinct to deliver the message better.

Stuff your email sequence

Prospects do not have the time or energy to receive information from you across different channels. So limit your email sequence or sales sequence to 5 emails per lead.

Be impatient

This is probably highly underrated, but persistence is key to the success of your role. Since you have to follow up with multiple leads, getting results immediately might be at the top of your priority list. But having some patience, and focusing on building a long-lasting relationship with the prospect will deliver better results over time.

Give too much information

The knack of the SDR outreach is to create and build interest in conversations. Giving away more information than required in the initial calls or email outreach will get the prospect overwhelmed and can cause dropouts.

Pitch the product in the first call

Don’t be in a rush. Understand the challenges of your prospect, what they are looking for, and finally, pitch the value of your product, but not your product itself.

We hope all these resources and tips help you in your daily tasks and aid you in your career journey as a sales development rep!