

Improving the Perform/Close Rate of an SDR Team

While the script, objection handling and names being called have the biggest impact on the close rate of an SDR team, there are many tactics that can be employed to generate an increase. None of the ideas listed below are earth shattering but it takes real work to make sure they are being implemented on a daily basis without fail.

Perform rate increase tactics include:

Call Follow-Up: Once an appointment is booked, it makes a substantial difference to send an invite with an agenda. Similarly, sending a personalized note a few days before the appointment is going to take place with content that is applicable to the prospect can be helpful.

Reminders: It is critical to remind the prospect that the appointment is about to occur. The SDR should use ALL of these mediums including mail, text and LinkedIn. In addition, the SDR should attempt to reach the prospect and only as a last resort leave a message.

Hot Handoff: The more time that elapses between making the appointment and performing the appointment, the greater the chance that the appointment will not go off. A great way to ensure that it does is once the SDR finds a prospect that's willing to sit for an appointment, ask if they have time now and hand the lead off to a sales person that is ready to immediately perform the demonstration.

Reschedules: Anywhere from 80-90% of the leads that go through the sales process will not close. While some might go to a competitor, many simply don't purchase. A great source of leads are retreads. Companies that once looked at the solution but decided to pass for one reason or another. Calling them loss prospects back is a great way to generate additional demos and since they have already seen the solution they are often warmer than a new lead. It is important to know who is retread, be aware of their situation and hopefully show them something new.

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Offers: A great way to increase the perform rate is to offer something of value to the prospect if they show up for the appointment. Gimmicks such a free coffee or gift certificate tend not to work well. Instead try giving them something that is related to the product and also helps build trust in your company and solution. Hands down, the best give-way is an assessment of their particular situation and how your solution might help.

Further Specialization: A more aggressive way to improve the perform rate is to further specialize your SDR team. Instead of having an SDR that calls and books appointments, have an Jr. SDR that calls prospects and when one is reached the call is automatically routed to a Sr. SDR who then tries to close the prospect. Presumably, since the Sr. SDR is an experienced closer, this should generate a higher close rate. Note – most CRM packages will not allow this level of specialization.
