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The SDR Success Formula:

Driving High-Volume Results in Recruiting and Staffing – A Playbook for Victory

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The recruiting and staffing industry is currently experiencing a "tale of two teams": some offices are consistently hitting home runs with their Sales Development Representative (SDR) strategy, while many others are striking out or stuck in a slump.

The key differentiator, much like a championship team's winning strategy, lies in the precise and correct execution of a comprehensive SDR success formula. Simply putting an SDR on the field doesn't guarantee a win. This white paper outlines the best practices for implementing an SDR program, focusing on significantly higher activity metrics to achieve optimal results and secure those crucial victories.

The SDR Success Formula: A Holistic Game Plan

Achieving high levels of success with an SDR requires mastering every component of the SDR success formula – truly a holistic game plan where every player contributes to the win. This formula includes:

- Hiring the right individual – finding your star player.
- Setting the right expectations for volume and results – defining the scoreboard and what it takes to win.
- Providing comprehensive training – putting your players through a rigorous training camp.
- Engaging in daily management and role-playing – constant coaching and practice drills.
- Effectively redirecting when necessary – making in-game adjustments and tactical timeouts.
- Using an Omni Channel Technology Approach to Appointment Setting – utilizing every tool in the playbook for a diverse attack.
- Using Compelling Reasons that Drive Conversations – crafting winning plays and compelling narratives.

Offshore or nearshore SDRs can be highly effective in generating conversations and success within the recruiting industry when utilized appropriately, much like recruiting top talent from a global pool.



The SDR Success Formula in Detail

1. Hiring the Right SDR: Finding Your MVP

The most effective way to hire an SDR is to seek individuals who have a proven track record of success in the role – someone who has already demonstrated they can consistently score. When evaluating candidates, look for:

- Prior experience successfully being a Sales Development Rep before – a seasoned veteran of the game.
- Consistent achievement of correct activity and results targets – a player who consistently puts up numbers.
- Proficiency in using similar technologies – someone who knows how to use the equipment.
- A good fit for your specific vertical market (e.g., construction may have different needs than IT) – a specialist who understands your specific playing field.
- Excellent communication skills, both verbal and in writing – a clear communicator on and off the field.
- Coachability and a willingness to continually improve – someone eager to learn new plays and refine their technique.
- A readiness to engage in daily role-playing – a player who embraces practice drills.
- Outgoing and confident: An SDR needs to be naturally outgoing and confident to build rapport and engage in peer-to-peer conversations – a natural team leader.
- Naturally inquisitive: They must be naturally inquisitive to understand the objections they face and skillfully close on getting the appointment – a strategic thinker who can read the defense.

Specific Best Practices for Hiring:

- **Develop a comprehensive job description:** Clearly outline the high-volume activity expectations and the need for prior SDR success – setting the rules of the game from the start.
- **Prioritize experience over potential:** While potential is valuable, a proven track record significantly reduces ramp-up time and increases the likelihood of immediate impact – sometimes you need a player who can start scoring from day one.
- **Conduct behavioral interviews:** Ask for specific examples of how candidates have met activity targets, overcome objections, and adapted to feedback in previous SDR roles – analyzing their game film.
- **Assess communication skills rigorously:** Require written communication samples and conduct multiple verbal communication assessments – testing their ability to call plays.
- **Look for their ability to hold a confident and inquisitive conversation:** Do they sound like a confident captain in the field?
- **Role-play during the interview process:** Simulate common SDR scenarios to assess their coachability, willingness to engage, and their natural inquisitiveness in understanding objections and pushing for the close – putting them through a pre-draft combine.
- **Verify technology proficiency:** Ask about their experience with CRM, ATS, and other engagement tools – ensuring they can use all the team's equipment.



2. Setting High-Volume Expectations: The Daily Grind for Victory

A primary reason for SDR underperformance is a misunderstanding of the significant volume of activity required for success – it's not enough to just show up to the game; you need to put in the work. To achieve superior results, full-time SDRs in the recruiting and staffing industry should aim for:

- 150+ calls per day – consistent shooting.
- 100+ emails per day – continuous passing.
- 50+ LinkedIn messages per day – constant networking and strategic plays.

These high daily expectations must be communicated upfront and managed rigorously daily, like a coach demanding consistent effort in practice. A lack of sufficient volume, along with unconvincing reasons for appointments, are major contributors to lackluster SDR outcomes – missing too many shots and having no clear offensive strategy.

Specific Best Practices for Setting Expectations:

- **Communicate clearly from day one:** During interviews and onboarding, explicitly state the high-volume daily activity targets – laying out the expectations for game time.
- **Create a daily activity dashboard:** Visually track calls, emails, and LinkedIn messages to ensure transparency and accountability – a real-time scoreboard for individual performance. The RPM Dashboard is a perfect tool to manage this. www.rpm-usa.com
- **Establish weekly and monthly targets:** Break down the daily volume into achievable weekly and monthly goals – setting milestones on the path to the championship.
- **Explain the "why" behind the volume:** Help SDRs understand that high volume is directly correlated with achieving conversation and appointment goals – explaining how every shot contributes to the win.
- **Provide tools for efficiency:** Ensure they have access to dialing software, email automation, and LinkedIn tools to manage the high volume – equipping them with the best gear.



3. Comprehensive Training: The Rigorous Training Camp

Ongoing and thorough training of an SDR is mission critical to their success – it's where champions are forged. This training should encompass:

- Initial instruction in the use of technology – learning how to use the team's equipment.
- Training and role-playing on the outreach messages – practicing the offensive plays.
- Overcoming objections – mastering defensive strategies. Practice weekly.
- Setting up appointments – perfecting the game-winning shot.
- Persistently reaching out more than 7 times – relentless pursuit of the goal, never giving up on a play.
- Daily review and role-playing of outreach messages to continually improve – daily film study and practice drills.

Specific Best Practices for Training:

- **Structured onboarding program:** Implement a multi-week onboarding plan that covers all essential aspects of the role – a comprehensive pre-season training program.
- **Technology mastery:** Provide in-depth training on your CRM/Applicant Tracking System, ZoomInfo, HireEZ, LinkedIn, and any other omnichannel engagement tools – becoming fluent with the whole team's technology.
- **Script and messaging development:** Collaborate with SDRs to create compelling and adaptable outreach messages, then continuously refine them through role-playing – developing and perfecting the team's offensive playbook.
- **Objection handling workshops:** Dedicate specific training sessions to common objections and practice various techniques for overcoming them – simulating game-day pressure.
- **Emphasize the importance of natural inquisitiveness to understand the underlying concern:** Teaching them to read the defense and anticipate their next move.
- **Appointment setting best practices:** Teach them the art of structuring an appointment and transferring it effectively to the principal – the perfect pass to set up the score.
- **Train them to confidently close on the appointment:** Equipping them to hit the game-winning shot.
- **Persistent follow-up strategies:** Emphasize the importance of reaching out more than 7 times and provide strategies for multi-channel follow-up – showing them how to stay in the game and keep pushing for the win.
- **Record and review calls:** Utilize call recording software for coaching and self-assessment, reviewing daily to continually improve – analyzing the game film to get better.



4. Daily Management and Role-Playing: The Coach's Huddle and Daily Drills

Consistent daily management is essential for an SDR's performance, akin to the level of attention given to a new player in your office. Each day, dedicated time should be allocated to:

- Looking at activity and results for the day before – reviewing yesterday's game stats.
- Listening to and role-playing the messages for areas to improve – analyzing the plays and practicing better execution.
- Setting goals for the upcoming day – strategizing for today's game.

Specific Best Practices for Daily Management:

- **Daily 1:1 check-in:** Conduct brief, focused daily meetings to review metrics, address challenges, and set goals – quick huddles before the game.
- **Live call listening and immediate feedback:** Whenever possible, listen to live calls and provide real-time coaching, focusing on their confidence, outgoing nature, and inquisitiveness – sideline coaching during the game.
- **Dedicated role-playing sessions:** Beyond reviewing, actively engage in role-playing various scenarios to build confidence, refine skills, and practice their inquisitive approach to objections and closing – constant practice drills to build muscle memory.
- **Review CRM/ATS data daily:** Analyze their activity, conversion rates, and pipeline health to identify areas for improvement – studying the detailed game statistics.
- **Celebrate small wins:** Acknowledge daily progress and achievements to maintain motivation – celebrating every basket, tackle, or goal.



5. Redirecting for Optimal Performance: Making In-Game Adjustments

Effective SDR management involves continuously monitoring for any deviations from the established path – much like a coach watching for players drifting from the game plan. When an SDR veers off track, prompt monitoring and redirection are crucial to re-align their efforts and get them back in the game.

Specific Best Practices for Redirecting:

- **Proactive monitoring:** Regularly review their activity metrics, call recordings, and message content to spot issues early – constantly watching the game footage for missed assignments.
- **Identify root causes:** When an SDR is off track, understand why—is it a training gap, a motivation issue, or a process problem? – diagnosing the problem: is it a skill issue, a morale issue, or a flaw in the playbook?
- **Pay attention to whether their confidence or inquisitiveness is faltering:** Are they losing their competitive edge or their ability to read the game?
- **Provide constructive feedback:** Deliver feedback in a timely, specific, and actionable manner – clear and direct coaching points.
- **Develop a corrective action plan:** Work with the SDR to create a clear plan for getting back on track, with measurable goals and deadlines – devising a new strategy with clear targets.
- **Increase coaching intensity:** If redirection is needed, increase the frequency and depth of coaching sessions – more one-on-one time with the coach.
- **Leverage peer mentoring:** Pair struggling SDRs with high performers for guidance and support – having a veteran player mentor a rookie.

6. Using an Omni Channel Technology Approach to Appointment Setting: A Multi-Faceted Offensive Attack

Since there are four generations in the workforce today, all using different preferred methods of communication, we also must be using each generation's preferred method to communicate to get appointments – just like a diverse offensive attack that uses various plays to break through the defense. A typical SDR Omni Channel will include cadences over a period that utilizes Phone, Voice Mail Drop, Linked in Messaging, Email, social media, Text, and Emails – a full arsenal of offensive weapons. The big four used daily are LinkedIn, Email, Voice Mail and Text simultaneously – these are your core offensive plays.



7. Compelling Appointment Strategies: Crafting Your Winning Plays

While many in the industry primarily rely on bringing "A" players or Most Placeable Candidates (MPCs) to market, a diverse range of compelling appointment strategies is vital for SDR success – you cannot win every game with just one play. The SDR's role is to secure a structured appointment for the principal – getting the ball to your star player in a scoring position. Here are several strategies and example scripts that should be part of your SDR's arsenal:

Bringing Top Talent (MPC/"A" Players) to the Market:

"Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution industry. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He has a \$17 million producer from one of your competitors that is confidentially looking to make a change, and he thought of you. Does tomorrow or Thursday at 9am work for a ten-minute Zoom call?"

- **Specific Best Practice:** Emphasize the exclusivity and high value of the candidate – offering a truly elite player. Research the prospect's needs to ensure the talent is truly relevant – making sure your star player fits their team's needs.

Calling about a Job Opening:

"Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution technology providers. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He notices that you have an opening for _____, and we recently filled that for another organization and potentially have candidates to talk about today. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Leverage public job postings (LinkedIn, indeed, etc.) and quickly identify relevant past placements or current candidates – finding open lanes to drive through. Personalize the message to the specific job opening – tailoring your play to their defense.

High-Level Recruiting Call/Flip to Business Development:

"Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution industry technology providers. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. He was very impressed by looking at your background and has many high-level roles available. He would like to network with you regarding those. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Research the prospect's background thoroughly to identify high-level roles that would genuinely appeal to them – understanding their career aspirations. The goal is to initiate a broader conversation, not just a specific job pitch – playing a long game, not just a single quarter.

C-Suite Conversation:

"Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide



Robotics solutions to the warehouse and distribution center technology providers. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar. We have helped many companies in the industry significantly increase revenue and achieve company vision over the last 20 years by bringing on board their employees for mission-critical roles. He thought it may be mutually beneficial for both parties for an introduction call. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Focus on strategic business outcomes and how your firm has helped other companies achieve their vision – talking about championship wins. Frame the call as a mutually beneficial introduction, emphasizing the principal's expertise – a strategic meeting of team leaders.

A Solution to a Problem (Virtual Bench):

"Hi Jim, I am Dave Bautista from Global People. As you may know, we help the top companies that provide Robotics solutions to the warehouse and distribution center technology providers. (The Problem) If you are like most of our clients, they see their mission-critical openings going unfilled for 6, 12 and even 18 months. Which costs them valuable time and hundreds of thousands of dollars in hard costs. My CEO, Jon Bartos, asked that I reach out and get 10 minutes on your calendar to show you how we have solved this problem for many of your competitors by using our proprietary Virtual Bench. Our clients see many of their mission-critical roles filled in under 30 days. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Specific Best Practice:** Clearly articulate a common pain point faced by prospects in their industry – identifying a weakness in their game. Position your firm's solution as a direct answer to that problem, highlighting quantifiable benefits and results – offering a winning strategy to overcome their challenges.

Overcoming Objections: Defensive Maneuvers

SDRs must become adept at addressing common areas of resistance to move conversations forward and secure appointments – mastering the art of breaking through the defense. Some most common objections and strategies to overcome resistance and book appointments include:

"We don't have any openings".

"I certainly understand. Besides (the reason for the call), Jon would like to introduce himself and our firm and what we can do to help both you and your firm down the road. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Best Practice:** Shift the conversation to future needs or general talent acquisition challenges – pivoting to a different play. "I understand you don't have active openings right now, but many companies find it valuable to connect with top talent proactively for future needs or unforeseen projects. Would it be worth 10 minutes to discuss how we build a virtual bench of specialized talent for our clients?"

"Talk to HR."

"With the clients we work with, we work closely with their HR Departments as well. However, the conversation always starts with hiring managers to really understand their goals, their needs, and their vision. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"



- **Best Practice:** Acknowledge HR's role, but pivot to the strategic impact – respecting their team, but aiming for the executive box. "Absolutely, HR is crucial. My CEO, Jon Bartos, typically speaks with leaders like yourself about the broader business impact of talent acquisition and how strategic hires can directly influence revenue and company vision. Would you be open to a brief 10-minute introduction?"

"I don't have any time now."

"Jon will be as flexible as possible to have an opportunity to speak with you. It's very important to him. What times on calendar can you break free for 15 minutes?"

- **Best Practice:** Validate their time constraints and emphasize brevity and value – a quick, impactful play. "I completely understand you're busy, and that's precisely why my CEO asked for just 10 minutes. He has something specific and valuable to share that we believe could save you significant time and resources in the long run. Would [specific time] work better, or perhaps [alternative time]?"

"I am not interested."

"If you do not mind me asking, why is that?"

"There are many reasons Jon would like to have a 10-minute conversation with you. He asked me to help him get you on his calendar because he would like to meet you. The worst-case scenario is when you make a new friend in the industry, who happens to be the top executive search recruiter who has talent that can help you achieve your organization's vision. Does tomorrow or Thursday at 9am work for a 10-minute Zoom call?"

- **Best Practice:** Gently probe for the reason behind their disinterest or pivot to a different value proposition – trying another angle of attack. "I appreciate your honesty. To ensure I am not wasting your time, could you quickly tell me what this isn't aligning with your current priorities? Or, if you're not interested in [initial offer], would you be interested in learning how we've helped companies like yours [insert a different value proposition, e.g., reduce time-to-fill for critical roles]?"

By meticulously implementing each element of the SDR success formula, with a strong emphasis on high-volume activity and diverse appointment strategies, recruiting and staffing firms can transition from lackluster results to significant success with their Sales Development Representatives – truly becoming a championship team.