

The Founder Academy
Sales Excellence Series

Build Your Foundation

SDR Success Playbook

Ashraf Hussain

A large, bare tree stands in the center of the frame, its branches reaching upwards. Behind the tree, a bright, hazy light source, likely the sun, creates a strong backlighting effect, casting a warm, golden glow across the scene. The sky is a mix of soft orange and pale blue. In the background, to the left, the silhouette of a house is visible. To the right, there are more trees and a misty or foggy landscape. A small, solid yellow circle is positioned just above the top of the tree's canopy.

SDR Success Playbook – Build your foundation.

How to Book More Meetings, Beat Quota & Build Your Sales Career

By Ashraf Hussain | The Founder Academy – Sales Excellence Series

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Introduction

Hi, I'm **Ashraf Hussain**, founder of **The Founder Academy**. My journey in sales has been extensive, and I am excited to share the insights and experiences that have shaped my career. I believe in the power of structured learning and practical application, which is why I crafted this playbook. It is designed to empower aspiring sales professionals to achieve their goals and build successful careers in sales.

What do I mean by “high-ticket” sales?

A quick search online will yield a variety of definitions for high-ticket sales, with figures ranging from **£1,000 to £10,000+**. While these numbers are technically accurate, the critical point that many overlook is the similarity in the sales process for both a £1,000 deal and a £10,000 deal. It's not the price point that defines success; instead, it's your ability to follow a structured approach, maintain consistency, and execute the right steps. This playbook will guide you through these essential processes, ensuring you understand the nuances that lead to successful high-ticket sales.

Why listen to me in the age of AI?

You might wonder, *"Why should I read your playbook when I can simply consult AI?"* This is a valid question in today's tech-driven world. However, if you're in sales, you already know that **people buy from people**. Trust is a fundamental element of the sales process; clients are more inclined to engage with individuals whom they trust, whether that interaction occurs over the phone, face-to-face, or through a video call. While AI can generate information and insights, it lacks the depth of personal experience that comes from years in the field. It cannot convey the emotional journey of transforming a cold prospect into a loyal client or the hard-earned lessons learned along the way.

I began my sales career over a decade ago, and like many in this field, I learned through experience and often through difficult lessons. I encountered numerous challenges, including endless rejections, unmet targets, flawed processes, and the relentless pressure to perform consistently month after month. However, I also experienced the exhilaration of closing significant deals, fostering long-term relationships, and witnessing the transformation of cold prospects into dedicated clients. These experiences have enriched my perspective on sales and shaped my approach.

Throughout my career, I have held various roles within the sales domain, including **Sales Development Representative (SDR)**, **Business Development**, and **Account Management**. My journey eventually led me into leadership positions, where I had the privilege of managing teams across all three functions. At one point, I juggled a **hybrid Business Development and Account Management** role, effectively performing two jobs simultaneously. This demanding experience pushed me to learn quickly, think strategically, and master the core principles of sales under pressure.

Over the years, I have personally closed over £5 million in sales, built million-pound pipelines, and consistently achieved renewal rates exceeding 97%. I have also led teams that not only met but surpassed their growth targets year after year. Beyond the impressive numbers, the most fulfilling aspect of my career has been **mentoring** others. I take great pride in helping SDRs, Business Development Managers, and Account Managers build their confidence, refine their strategies, and understand that success in sales is not merely a matter of luck; it is a systematic process that can be mastered.

This commitment to helping others succeed is why I created **The Founder Academy Sales Playbook Series**. These are practical, no-nonsense guides drawn from my real-life experiences in sales. My goal is straightforward: to assist you in achieving and exceeding the success I have enjoyed throughout my career.

Who this is for

- Individuals seeking to break into the sales field who may not know where to begin.
- Sales Development Representatives (SDRs) who are looking for structure, clarity, and tangible results.
- Experienced professionals wishing to refine their skills and accelerate their career trajectories.

In this **SDR Success Playbook**, you will explore the fundamentals of **outbound prospecting**, learn to handle rejection effectively, and discover strategies for booking those all-important initial meetings. More significantly, you will acquire the mindset of a professional; you will learn how to establish productive habits, track your metrics, manage your energy, and grow from both your victories and challenges.

This playbook is not theoretical; it is a reflection of **my lived experience**, transformed into a **step-by-step blueprint** that you can follow to enhance your sales capabilities.

Glossary

- **SDR (Sales Development Representative)** – Responsible for generating and qualifying opportunities through both outbound and inbound prospecting.
- **Business Development** – Concentrates on identifying new opportunities and building a robust sales pipeline.
- **Account Manager** – Focuses on retaining, renewing, and expanding the scope of existing accounts.
- **KPI (Key Performance Indicator)** – A quantifiable measure that assesses performance.
- **ICP (Ideal Customer Profile)** – Defines the type of company or individual who derives the most benefit from your solution.
- **SQL (Sales Qualified Lead)** – A lead that is prepared for a sales conversation.
- **BANT** – A qualification framework focusing on Budget, Authority, Need, and Timeline.
- **Pipeline** – The various stages that prospects navigate from initial outreach to final closing.
- **Objection Handling** – The process of addressing and resolving hesitations during sales discussions.

Module 1: Metrics – KPI – Excel Tracking

Quote: *"What gets measured gets managed."* – Peter Drucker

Why This Matters

Sales is fundamentally a numbers game; however, it is even more accurately described as a **numbers learning game**. Without a deep understanding of your ratios—such as how many calls you need to make to book a meeting, how many meetings you require to create an opportunity, and how many opportunities are necessary to close a sale—you are essentially navigating without a compass. Below, you will find a comprehensive table outlining the typical framework for an SDR's daily activities.

Metric	Description	Benchmark / Goal	Tracking Method
Calls Made	Total outbound calls per day/week	40–80/day for SDRs	CRM activity logs, call dialler
Emails Sent	Personalized outreach emails	30–50/day	CRM or Outreach/SalesLoft
LinkedIn Messages / Connections	Social selling activity	10–20/day	LinkedIn SSI, manual tracker
Meetings Booked	Number of qualified meetings set	10–15/week	CRM opportunity source = outbound
Follow-ups Sent	Number of structured follow-ups	2–3 per lead	Email sequences, CRM tasks
Response Rate	Replies ÷ Emails sent	10–25% <u>avg</u>	Outreach analytics or manual count

When I began logging my daily activities, I noticed significant patterns emerging: my best connect rates occurred in the mornings, my meeting conversion from LinkedIn surpassed that of email outreach, and my show rate improved when I confirmed meetings twice. This diligent tracking granted me a sense of control over my sales processes.

I recommend adopting a different approach, and here is a detailed framework to follow:

Framework

1. **Define KPIs** → Call Per day (200), emails (100 per day), LinkedIn messages (50 per day), connection acceptance (30–40%), meetings/week (5+), show rate (70%+), SQL conversion.
2. **Build a Tracker** → Daily activity tab, weekly summary, monthly trend graphs.
3. **Daily Routine** → Log daily, review weekly, spot monthly bottlenecks.

I have set the target for making 200 calls a day, which may seem overwhelming at first; however, you will find that when we delve into prospecting later, achieving this target becomes manageable. As an SDR, your primary objective is to book meetings. The more people you engage with through calls, the higher the number of meetings you will book, which ultimately translates into increased sales.

While there may be days when you do not reach the 200-call benchmark, it is important to view this as an aspirational target. I used to dedicate at least two days each week to making cold calls, a practice I still maintain. Based on my experience, Tuesdays and Thursdays are the most effective days for making calls, particularly as many people are back in the office post-COVID. On these days, I focus solely on cold calling. Of course, this may vary depending on your territory; however, if you can make calls both in the morning and afternoon, you will be significantly ahead of your peers.

Emails and LinkedIn outreach can be grouped under one category. Sending 100 emails to the same persona is quite manageable. You can develop a template and commence sending them out. Naturally, these emails should be tailored to the individual's role to serve as an effective initial introduction that encourages engagement. Moreover, it is crucial to connect with them on LinkedIn, if you haven't already, after making your initial call and sending an email. Once your contact accepts the connection, you should send a polite thank-you note before initiating further engagement. **Refrain from selling during your first interaction.** Remember that people prefer to buy from people, so it is essential to establish credibility first. I will elaborate on this process later in the playbook.

Mistakes to Avoid

- Tracking weekly instead of daily.
- Focusing solely on inputs rather than outputs.

Pro Tips

- Utilize conditional formatting (green = target hit, red = missed).
- Share your weekly tracker with your manager.

Checklist

- Create an Excel tracker.
- Log your activities daily.
- Conduct a weekly review.

I have included a basic Metrics Tracker Template to help you get started. Additionally, I have a more detailed tracker available in my second book in the series, titled **"The Business Development Playbook – How to Close New Business and Scale Revenue"**.

You will find the **SDR Metrics Template Visual** attached to the bonus resources section.

Module 2: Analytics

Quote: *"Without data, you're just another person with an opinion."* – W. Edwards Deming

Why This Matters

Analytics are essential for enhancing your performance in sales. They provide clarity on where your meetings originate and help you identify which channels yield the best results. Without this information, you risk wasting precious time on less effective outreach methods.

Through careful analysis, I discovered that VPs were more responsive on LinkedIn, while managers preferred email communication. This single insight effectively doubled my meeting booking rate, demonstrating the impact of targeted analytics.

If you report to a Business Development manager or a similar role, they will invariably assess your output concerning conversion rates. The key areas they scrutinise include:

1. Total outreach to meetings booked.
2. The number of meetings that resulted in no-shows.
3. The number of meetings that advanced to the next sales stage.
4. The number of opportunities that were closed successfully.
5. Your usage of the CRM tool.

Based on these metrics, your manager will provide coaching aimed at improving your conversion rates. As an SDR, it is crucial to ascertain the minimum conversion rate that your company expects from you. Your goal should be to consistently surpass this number and strive to become the top SDR within your organisation.

Framework example

Area	What Managers Analyse	Questions They Ask	Benchmarks
Call Volume	Number of outbound dials daily/weekly	Are they making enough quality calls?	40–80 per day
Email Outreach	Personalised vs. generic sends	Are emails relevant, timely, tailored?	30–50/day
Follow-Ups	Structured follow-ups with value	Are they nurturing leads or spamming?	2–3 per contact
Social Selling	Activity on LinkedIn / networking	Are they visible, engaging, building brand?	10–20 actions/day
CRM Hygiene	Notes, tasks, updates, data accuracy	Can management trust their data?	100% clean CRM

Conversion & Pipeline Metrics

This indicates whether their activity translates into a meaningful pipeline

Area	What Managers Analyse	Questions They Ask	Benchmarks
Contact-to-Connect Rate	% of calls reaching decision-makers	Are they calling at the right times?	15–25%
Connect-to-Meeting Rate	% of connects converting to meetings	Are they using strong hooks and value props?	20–35%
Meeting-to-Opportunity Rate	% of meetings becoming pipeline <u>opps</u>	Are they qualifying correctly?	30–50%
Opportunity Conversion	% of <u>opps</u> that close	Are they targeting well?	15–30%
Pipeline Value Created	Value of opportunities sourced	Are they building quality pipeline?	Target-based

Quality of Outreach & Messaging

Managers evaluate how strong and relevant their communication is.

Area	What Managers Analyse	Questions They Ask
Call Recordings	Tonality, objection handling, discovery depth	Do they sound confident? Curious? Consultative?
Email Copy	Personalisation, clarity, CTA strength	Are they using insights or templates?
Social Messaging	Tone and relevance of LinkedIn DMs	Are they adding value before asking?
Research Depth	Use of company, industry, trigger insights	Are they tailoring or guessing?

This area often separates the top 10% of SDRs from the rest — quality beats volume.

Process & Discipline

SDRs who excel are characterised by their structured approach; managers evaluate their consistency.

Area	What Managers Analyse	What Good Looks Like
Time Management	Task batching, daily planning	Morning prospecting blocks, afternoon follow-ups
CRM Usage	Tasks completed, no stale leads	100% tasks up to date
Follow-Up Cadence	Persistence & timing	5–7 touchpoints per prospect
List Building / Research Process	Lead source quality	Relevant personas, ICP-aligned
Routine Discipline	Showing up ready, prepared, consistent	No missed dials, planned days

"Top performers are predictable and process-driven."

Skills & Behavioural Indicators

This aspect focuses on the soft skills that contribute to success but are often more challenging to measure.

Area	What Managers Analyse	Key Traits
Coachability	Response to feedback	Takes notes, applies changes fast
Resilience	Handling rejection	Bounces back after “No’s”
Communication	Clarity, energy, active listening	Concise, confident, engaging
Team Collaboration	Sharing insights with peers	Helps others win
Ownership / Accountability	Takes responsibility for targets	Doesn’t blame tools or leads

“Managers look for mindset — attitude over aptitude is often the long-term differentiator.”

Results & Output (Lagging Indicators)

Metric	Description	Example Target
Meetings Booked	Qualified meetings per week/month	10–15 per week
Pipeline Generated	Value of opportunities sourced	£50k–£150k/month
Quota Attainment	% of meetings or <u>opp</u> targets hit	100%+
Revenue Influenced	Deals closed from SDR pipeline	£100k+ quarterly
Cost per Opportunity	Efficiency metric	Decreasing trend over time

Qualified Meetings per Week/Month

On average, the target for qualified meetings is set between 10 to 15 per week. This consistent frequency is crucial for maintaining a robust sales pipeline and ensuring ongoing engagement with potential clients. Each meeting represents an opportunity to build relationships, understand client needs, and ultimately drive revenue. By adhering to this target, sales representatives can effectively gauge their outreach efforts and make necessary adjustments. Achieving this goal requires a strategic approach, leveraging various channels for outreach and engagement.

Pipeline Generated

Value of Opportunities Sourced

The pipeline generated can yield a substantial value of opportunities, ranging from £50,000 to £150,000 monthly. This range reflects the potential revenue that can be unlocked through effective lead generation and nurturing strategies. A well-managed pipeline not only showcases the current opportunities but also serves as a predictor for future sales performance. By focusing on high-quality leads and maintaining regular follow-ups, sales teams can maximise this potential. Understanding the dynamics of the pipeline is essential for setting realistic sales targets and achieving overall business growth.

Quota Attainment

Quota attainment is a critical metric that indicates the percentage of meetings or opportunity targets successfully hit, with an impressive benchmark of over 100%. This achievement illustrates the effectiveness of sales strategies and the ability to engage prospects meaningfully. Consistently exceeding quota targets not only boosts individual performance but also enhances the overall success of the sales team. By analysing successful tactics and learning from challenges, sales representatives can refine their approaches to maintain this high level of performance. Setting ambitious yet attainable quotas encourages a culture of continuous improvement within the team.

Revenue Influenced

The revenue influenced by deals closed from the Sales Development Representative (SDR) pipeline is substantial, exceeding £100,000 quarterly. This figure underscores the importance of a well-structured sales pipeline and the pivotal role of SDRs in the sales process. By effectively qualifying leads and facilitating connections, SDRs contribute significantly to the bottom line. This revenue generation reflects not just individual efforts but also the collective success of the entire sales team. Tracking this metric allows organisations to evaluate the effectiveness of their sales strategies and make data-driven decisions for future initiatives.

Cost per Opportunity

The cost per opportunity serves as an essential efficiency metric, demonstrating a decreasing trend over time. This decline indicates that sales processes are becoming more streamlined and effective in generating viable leads. By optimising outreach strategies and enhancing targeting efforts, organisations can lower their costs while increasing the quality of opportunities. A focus on reducing this cost can lead to improved profitability and a more sustainable business model. Continuous evaluation of the sales process is necessary to identify areas for further improvement and cost reduction.

Weekly Review

1. **Weekly Review** → It is imperative to analyse which outreach channels were the most effective, which Ideal Customer Profiles (ICPs) responded most positively, and which messaging hooks resonated with prospects. This regular analysis helps in refining strategies and improving overall performance. Understanding these metrics allows teams to allocate resources more effectively and focus on high-yield activities. By documenting these insights, sales representatives can continuously adapt their approaches to meet the evolving needs of their target audience. This iterative process fosters a culture of learning and growth within the team.
2. **Top-Performer Formula** → Identifying the optimal time of day for outreach, the most effective templates, and the ideal number of touches required to engage prospects is crucial for success. Analysing these factors helps in crafting a winning formula that can be replicated across the sales team. High-performing sales representatives often have a systematic approach to their outreach efforts, which can be distilled into actionable insights for others. By sharing these successful techniques, teams can elevate their overall performance and productivity. This formula serves as a foundation for continuous improvement and strategic planning.
3. **Experiment** → Implementing a testing approach by changing one variable at a time and measuring the outcomes is essential for optimisation. This method allows for clear insights into what works and what doesn't, enabling informed decisions moving forward. By systematically experimenting with different strategies, sales teams can identify the most effective practices and eliminate those that are less fruitful. Documentation of these experiments is vital for tracking progress and understanding the impact of changes over time. This scientific approach to sales can lead to significant breakthroughs in performance.

Mistakes to Avoid

To improve effectiveness, it is crucial to avoid certain common mistakes in the outreach process. Ignoring key ratios can lead to misguided strategies and missed opportunities for engagement. Additionally, giving up after just two to three touches is a prevalent pitfall; persistence is often necessary to see results. Recognising that prospects may be busy or preoccupied is essential in understanding the need for multiple outreach attempts. By remaining committed to the follow-up process, sales representatives can significantly increase their chances of success.

Pro Tips

To maximise effectiveness, consider blocking 30 minutes every Friday for in-depth analysis of outreach efforts. This dedicated time allows for reflection on what strategies worked, what didn't, and how to adjust moving forward. Additionally, saving three winning messages each week can serve as a valuable resource for future outreach. By creating a library of successful communication examples, sales teams can streamline their messaging and enhance their chances of engagement. Consistency in reviewing and refining approaches is key to maintaining high performance.

Checklist

SDR Analytics Dashboard is attached in the bonus resources section for further reference. This tool serves as a comprehensive guide for tracking performance metrics and assessing the effectiveness of sales strategies. Utilising such resources can help in identifying strengths and areas for improvement. Regularly consulting the dashboard ensures that sales representatives remain aligned with their goals and objectives. By consistently monitoring these analytics, teams can drive improvements in their outreach efforts.

Module 3: Brand – Connections – Events

Quote: *"Build a reputation that introduces you before you speak."*

Why This Matters

Establishing a strong brand is crucial as it warms up cold outreach efforts. Prospects who have seen your posts or met you at events are significantly more likely to accept your calls and engage in meaningful conversations. I initially hesitated to post weekly insights, but after attending webinars, I noticed that my LinkedIn acceptance rate doubled among the right audience. This shift transformed my outreach from being perceived as "cold" to more familiar and welcoming. The key to this transformation was my active participation in events where my target audience was present, thus bridging the gap between myself and potential clients.

By attending events organised by my company and asking internally for referrals to individuals I sought to connect with, I was able to cultivate my brand effectively. Over time, some of these clients became friends with whom I share regular conversations and even spend time with their families. Your reputation is an invaluable asset that follows you throughout your career, so it is essential to ensure it is a positive one. Building and maintaining strong professional relationships can lead to mutual benefit and long-term success in your career.

Framework

There isn't a strict framework for brand building; you can choose to post daily on LinkedIn, weekly, or even opt not to post at all while focusing on direct messaging. While it is important to represent your company, it is equally vital to cultivate your individual brand. Engaging with others by commenting on and liking their posts can substantially enhance your visibility and networking opportunities. Additionally, suggesting that prospects visit your office fosters genuine human connections, which are often more valuable than traditional outreach methods. Always carry business cards, as you never know who you might meet, especially at events where networking is a primary objective.

Examples

Here are a few examples that can enhance your outreach efforts: - Connection: "Hi [Name], I enjoyed your post on [topic] — let's connect." - Post: "Most meetings are booked after 5+ touches. If you're stopping at 2, you're leaving money on the table."

Mistakes to Avoid

When building your brand, it is important to avoid certain missteps. Posting solely promotional content can alienate your audience and diminish engagement. Equally, connecting with someone without introducing yourself can come across as disingenuous. Establishing a personal connection is essential in developing meaningful relationships. By being authentic and approachable, you enhance your chances of creating a lasting network.

Pro Tips

To streamline your content creation process, consider batch-writing posts on Sundays. This strategy allows for more thoughtful and consistent messaging throughout the week. Additionally, repurposing your best comments into posts can maximise your content's reach and engagement. By leveraging existing high-quality content, you can establish yourself as an authority in your field while saving time. Consistency and creativity are key in maintaining an active and influential online presence.

Module 4: Prospecting – LinkedIn Sales Navigator – Socials

Quote: *"Prospecting is the oxygen of sales."*

Why This Matters

Without consistent prospecting, the sales pipeline will inevitably stagnate. Tools like LinkedIn Sales Navigator and social media channels enable precise targeting, allowing sales representatives to focus their efforts on high-potential leads instead of wasting time on unqualified prospects. My experience shows that when I shifted from sending random connection requests to utilising saved searches, my connection rate skyrocketed from 15% to 45%. This strategic approach not only optimises time but also significantly enhances the quality of connections made.

The first individuals you should aim to connect with are the leaders in your industry. These are the influential figures that everyone recognises, and their endorsement can add credibility to your outreach efforts. Your LinkedIn profile serves as your social proof; thus, having a solid network of mutual connections greatly increases your chances of engagement. Prospects are more likely to respond positively when they see that you share connections with industry leaders, indicating that you are both part of the same professional landscape.

Framework Example

1. **Navigator Setup** → Build Ideal Customer Profile (ICP) searches using various filters such as industry, company size, seniority, and geography. This targeted approach allows for more relevant connections and engagements, ultimately leading to higher conversion rates. By being strategic in your setup, you can streamline your prospecting efforts and focus on the most promising opportunities.
2. **Daily Habit** → Aim to send out 20 new connection requests daily, engage with 5-10 prospects through comments or likes, and log leads in your Customer Relationship Management (CRM) system. Consistency in these daily habits helps in building a robust pipeline and enhances your visibility within your target market. Tracking your activities ensures that you remain organised and focused on your outreach goals
3. **Social Selling** → Prioritise engagement before outreach by giving value first and varying your content formats. This approach not only warms up your prospects but also positions you as a thought leader in your industry. By sharing valuable insights and resources, you create a foundation of trust that can lead to successful conversations later on.

Diversifying your content types can also capture different audience segments effectively.

Examples

Here are a couple of examples to illustrate effective outreach: - Connection: "Hi [Name], I enjoyed your comment on [post]. Would love to swap perspectives." - Direct Message: "Hi [Name], I saw you're hiring SDRs — I've got a 2-minute guide on reducing ramp time. Want me to share it?"

The second example highlights a powerful strategy that many sales representatives overlook. Offering something of value for free can significantly increase engagement and interest. This could be a newsletter about industry trends, a recent article related to their business, or even a report that addresses a common pain point. By providing value upfront, you position yourself as a helpful resource rather than just another salesperson. If you can demonstrate enough value, prospects may even initiate a call themselves.

For instance, if you send a report to 20 connections and 5 respond positively, those leads are no longer cold; you have effectively warmed them up. The next step is to assess the impression you've made by asking for their work email or phone number, or suggesting a coffee meeting if you are in proximity. A line like, "If you enjoyed that report, you will love what we have on..." can be quite effective in transitioning to a more formal conversation.

From my experience, connections that are nurtured effectively tend to have greater trust in you and are more likely to invest in higher-end services. Following the prospecting metrics discussed earlier, including making 200 calls per day, is achievable through structured planning.

Start by building a list of individuals you want to target. For example, if you are focusing on VPs, compile a list of as many VPs as possible, aiming for around 500 contacts. This list should be updated weekly to ensure it remains relevant. By concentrating your calling efforts on Tuesdays and Thursdays, you can maximise your chances of reaching decision-makers when they are available. During these calls, the primary goal should be to introduce yourself and schedule another call to delve deeper into their needs before arranging a meeting with the Business Development team.

As you conduct these calls, you will likely encounter common objections, which will help you refine your approach. Most individuals have access to their calendars while on their computers or phones, so asking if they have their calendar handy can facilitate scheduling. When they provide a time, promptly send a calendar invite and express gratitude for their commitment to the upcoming call. This method has allowed me to achieve an impressive attendance rate of around 90% for meetings.

The following week, you can shift your focus to a different persona, such as C-level executives, and implement the same calling strategy. During the other days of the week, engage in LinkedIn outreach and email follow-ups, ensuring you maximise your time effectively across multiple channels.

Mistakes to Avoid

Common mistakes to avoid include pitching your product in the first message and failing to log leads appropriately. These missteps can hinder your outreach effectiveness and result in missed opportunities. Establishing a connection without immediately selling can foster trust and open the door for future conversations. Keeping track of your leads is essential for managing your pipeline effectively and ensuring no valuable contacts are overlooked.

Pro Tips

Utilise Navigator alerts to stay informed about job changes within your target companies. This information can present timely opportunities for outreach. Additionally, consider using video or voice direct messages as a way to make your communications more personal. However, be mindful that this approach can be time-consuming, so it may be best to reserve it for the 4th or 5th touchpoint in your outreach cadence.

Checklist

SDR Prospecting Tracker is essential for keeping track of your outreach efforts and ensuring that no leads fall through the cracks. This tool can help you evaluate your progress and refine your strategies as needed.

Module 5: Leads – Organic – SEO

Quote: *"Speed to lead wins deals."*

Inbound leads represent warm opportunities since they have already expressed interest in your offerings. However, if you fail to respond quickly and qualify these leads properly, you risk losing them to competitors. When an inbound lead comes in, it typically indicates one of three scenarios based on my experience: they may be looking to change providers, have the budget to add to their existing subscriptions, or are conducting market research.

Why This Matters

Your objective should be to quickly determine which situation applies and to schedule a meeting on the same day. Demonstrating efficiency and a strong ability to meet customer needs is vital for fostering trust. These customers are already warm leads, allowing you to delve into more detailed discussions right from the initial call. I once lost a deal by waiting until Monday to respond to a Friday inquiry, only to find that the prospect had already engaged with a competitor. This experience taught me the importance of responding on the same day.

Framework

1. **Inbound Handling** → Always reply within 24 hours and reference the specific action the lead took to engage with your company. This personalisation shows that you value their interest and are attentive to their needs.
2. **Qualify with BANT** → Utilise the BANT framework—Budget, Authority, Need, Timeline—to assess the lead's viability quickly. This structured approach ensures that you gather the necessary information to tailor your follow-up effectively.
3. **Lead Prioritisation** → Classify leads based on their fit with your Ideal Customer Profile. High-fit leads should be fast-tracked, while medium-fit leads can be nurtured, and low-fit leads should be deprioritised. This strategy helps in managing your time and resources effectively.
4. **Align with Marketing** → Collaborate with the marketing team to follow up on downloads, webinars, and clicks. This alignment ensures a seamless experience for leads and enhances the likelihood of conversion.

Examples

Here are two examples to illustrate effective communication: - Email: "Hi [Name], thanks for downloading our [guide]. I'm curious, what stood out most to you? I'd be happy to share how other [ICP] have solved [pain]." - Call opener: "To point you in the right direction, can I ask a couple of quick questions?"

Mistakes to Avoid

Common mistakes include treating all leads equally and waiting more than 48 hours to respond. Not every lead will have the same level of interest or potential, so it is essential to prioritise them accordingly. Timeliness in responses is crucial; delays can lead to lost opportunities and potentially damage your brand's reputation.

Pro Tips

Utilise email tracking tools to monitor when leads reopen your content. This insight can inform your follow-up strategy and help you gauge interest. Additionally, including a calendar link in your first reply simplifies the scheduling process, making it easier for leads to engage with you.

Checklist

While most companies will have an internal tracker for inbound leads, I have attached a reference tracker along with a BANT sales qualification framework for your use. For further insights, refer to my second book in the series, “The Business Development Playbook – How to Close New Business and Scale Revenue,” where I detail the MEDDIC process and the questions necessary to progress leads to the next stage.

Module 6: Meetings – Agenda – Process

Quote: *"Structure creates confidence."* – Ashraf Hussain

Why This Matters

Meetings that lack structure can feel disorganised and unproductive. Having a clear agenda not only enhances professionalism but also instils trust in prospects. My own experience taught me the importance of establishing an agenda after a call where the VP asked, "What's the purpose of this?" This moment underscored the necessity of clarity and purpose in meetings.

While you may have booked the call, clients can forget the details of what was agreed upon, or worse, you may forget what you discussed. Therefore, sending a calendar invite with a brief template can serve as a helpful reminder for both parties. Clarity in communication is essential to facilitate a productive conversation.

Framework

1. **Pre-Call Research** → Conduct thorough research on the prospect via LinkedIn, keeping an eye on company news and any trigger events. Prepare 2–3 tailored questions to demonstrate your understanding of their business.
2. **Agenda Structure** → Organise your meeting into segments: rapport-building (2–3 minutes), agenda overview, discovery phase, value proposition, and next steps. This structure allows for a balanced discussion and ensures that all essential topics are covered.
3. **Post-Meeting** → Send a recap email within 24 hours to summarise key points discussed and confirm next steps. This follow-up reinforces the importance of the meeting and keeps the momentum going.

In a typical 20 to 30-minute call, allocate the first 5 to 10 minutes for introductions and a brief premise of the call. The next 10 minutes should focus on discovering the client's needs, followed by a call to action in the final 5 to 10 minutes.

During online meetings, it's advisable to leave a few minutes at the end for questions. At the beginning of the call, inquire if the client has another call scheduled immediately after; if not, seek permission to extend the discussion if needed. Setting this tone helps manage time effectively and ensures that you cover all necessary points.

The discovery phase is critical and should be the primary objective of the call. Summarising the conversation at the end and clearly stating the next step—whether it's booking a demo or scheduling a follow-up discussion with a Business Development representative—can significantly enhance your close rate. This method effectively distinguishes between curious prospects and serious clients.

Examples

Here are some examples to consider: - Agenda opener: "Today we'll cover X, Y, Z — does that sound good?" - Discovery question: "If you could wave a magic wand, what would you change tomorrow?" - Recap email: "Thanks for the call. Here's what I captured... Next step: [agreed action]."

Mistakes to Avoid

Common pitfalls include holding meetings without an agenda and failing to establish a clear next step at the conclusion of the call. Without a defined agenda, meetings can lose focus and become unproductive, while a lack of follow-up can lead to missed opportunities.

Pro Tips

Always aim to book the next step live during the meeting. This proactive approach facilitates accountability and commitment. Additionally, maintain a bank of 20 discovery questions that you can draw upon to keep conversations engaging and insightful.

Checklist

Checklist: - Conduct pre-call research. - Set the agenda both verbally and in the meeting invite. - Confirm the next step with the prospect. - Send a recap email following the meeting.

Module 7: Follow-Up – Call to Action – 2/3 Day Follow-Up

"The fortune is in the follow-up." – Zig Ziglar

Why This Matters

Most SDRs stop too early. They often send one email, one LinkedIn message, or make a single call, and when there's no response, they prematurely assume the prospect isn't interested. In reality, prospects are frequently busy, distracted, and juggling multiple priorities. Therefore, you are not being ignored; you simply haven't made it to the top of their mind yet.

The follow-up process represents the intersection of persistence and professionalism. It is the disciplined effort that transforms mere curiosity into meaningful conversations. When I developed my own structured 4-step cadence, I witnessed a significant doubling of my reply rates—not because my product had changed, but due to the consistency of my outreach efforts.

The most successful SDRs are not necessarily those who craft the most creative emails; they are the ones who strategically follow up the most. This strategic follow-up can be the defining factor that leads to successful conversions.

Framework: The 4-Step Follow-Up Cadence

Consider your follow-up process as a rhythm rather than a reaction. It should not be random; instead, it should be planned, deliberate, and based on data.

Step 1 – Day 0: The First Touch (Email + LinkedIn) - Combine an email with a connection request or LinkedIn message. - Keep your message concise, value-driven, and personal. - Demonstrate that you've done your research: "I saw your recent announcement on [topic]. We've helped others in [industry] scale [result]. Worth a chat?"

Step 2 – Day 2–3: Call + LinkedIn Engage - Avoid hiding behind email; make the call. -

Reference your earlier message: “Hi [Name], I reached out earlier this week about [solution]. I know things get busy—would you be open to a quick chat to see if this is relevant?” - Engage with their posts by liking or commenting to maintain visibility.

Step 3 – Day 5–7: Email (New Angle) - Introduce something fresh—a case study, an industry article, or a recent trigger event. - For example: “I thought you might find this report on [trend] useful—it’s helped several of our clients rethink [pain area]. Would Thursday or Friday work for a quick chat?”

Step 4 – Day 10: The Breakup Email - This serves as your closing message. Keep it short, respectful, and confident. - For example: “Hi [Name], I don’t want to keep chasing if this isn’t a priority. Should I close your file or keep this open for later?” - Breakup emails often yield the highest reply rates, as they exhibit confidence and professionalism.

Pro Tip: Do not rely on a single channel. Employ a multi-touch approach (email, phone, LinkedIn) to enhance visibility and increase the chances of engagement.

CTA Clarity: Make the Next Step Easy

A great call to action (CTA) should be specific rather than vague. Too many SDRs conclude their messages with ambiguous requests. Instead, aim for clarity that prompts immediate action from the prospect.

“Let me know if you’re interested.” This phrase inadvertently shifts the responsibility to the prospect, placing the onus on them to respond. Instead of leaving them with a vague invitation, consider providing them with two specific options. For instance, you might say, “Does Thursday at 3 PM or Friday at 10 AM work better for a quick chat?” By offering clear choices, you simplify the decision-making process. The easier it is for them to choose, the more likely they are to say “yes.” Always end your outreach with a call to action rather than merely leaving it to chance.

Varying your approach in follow-ups is essential for maintaining engagement. If all your follow-ups sound alike, you risk losing the prospect's attention. Each touchpoint should introduce something fresh and relevant to keep the conversation dynamic.

Here's how you can diversify your approach:

First, in your initial touch, focus on problem awareness by stating, "We help [Ideal Customer Profile] who are struggling with [pain]."

Second, establish credibility with statements like, "We recently assisted [company] in achieving [result]."

Third, provide value by sharing insights, such as "Here's a short article on [topic] that might be beneficial."

Lastly, create a sense of urgency by asking, "Should I close this out or keep it open?" Each interaction tells a story, guiding the prospect from curiosity to relevance, trust, and ultimately, decision-making.

When it comes to follow-up communications, having a few examples can be tremendously helpful.

For instance, in a follow-up call, you might say,

"Hi [Name], I reached out earlier this week. I wanted to share how we helped [Ideal Customer Profile] overcome [pain]. Are you the right person to explore this with, or could you recommend someone else on your team?"

This approach keeps the conversation focused on value. In a breakup email, you could express,

“Hi [Name], I don’t want to chase if this isn’t a fit. Should I close your file or keep this open for later? I’d hate for us to miss the chance to assist if the timing just isn’t right.”

Finally, a re-engagement example two to three weeks later could be, “Hey [Name], circling back as I thought you’d find this interesting — [short value insight]. Are you open to revisiting this conversation?”

When it comes to follow-ups, there are several common mistakes you should avoid.

- First, avoid the phrase “Just checking in.” This generic statement adds no value and sounds like a message that everyone else sends.
- Second, resist the temptation to copy and paste the same message each time. Instead, change your tone and focus in each follow-up to keep it fresh.
- Third, following up without context is unproductive; if your last touch didn’t provide value, the next one likely won’t either. Additionally, be cautious of over-following too soon; ensure you space out your communications to give each touchpoint room to breathe.

To enhance your follow-up process, consider these professional tips derived from experience.

- First, personalise the first touch, then systematise the subsequent ones. Use templates and automation after your initial outreach to maintain efficiency without losing the personal touch.
- Second, humour can be effective when used judiciously. For example, a light-hearted breakup email might read, “I’m starting to think my emails have entered your spam folder — should I send a rescue team?”
- Third, always close the loops; if a prospect replies with “not now,” make a note and set a reminder to follow up in four to six weeks.
- Fourth, track your cadence performance to see which steps drive the most replies; often, it’s the third or fourth touch that proves most effective.

To ensure a comprehensive follow-up strategy, utilise this checklist.

- First, build a 4 to 5-step follow-up cadence that incorporates multiple channels.
- Second, employ clear calls to action, ideally time or date-based, to streamline the decision process.
- Third, ensure that each touchpoint adds new value to the conversation.
- Fourth, never reuse the same message; each interaction should feel unique.
- Fifth, always conclude with a confident closing statement.
- Lastly, review your response data weekly to refine your cadence based on what works best.

Case Story

Reflecting on a case story from a few years ago, I reached out to a VP at a prominent infrastructure firm. My first three outreach attempts garnered no response, and the fourth was met with silence. Most Sales Development Representatives would have given up at that point, but I understood from experience that interest and timing do not always align. It was only on the eighth touch that I finally received a reply: “Thanks for your persistence, let’s chat.” That conversation ultimately led to a £60,000 deal. The key takeaway? Every “no reply” doesn’t equate to rejection; it’s simply a “not yet.” Staying consistent and structured allows your follow-up cadence to do the heavy lifting.

Module 8: Mentor – Growth Mindset – Proven People

The role of mentorship in developing a growth mindset cannot be overstated. Having a mentor who understands the challenges of the sales landscape can provide invaluable guidance and support. A growth mindset fosters resilience and a willingness to learn from both successes and setbacks, enabling you to navigate the complexities of sales more effectively. Engaging with proven individuals in your field can accelerate your learning and help you adopt best practices that lead to success. Ultimately, prioritising mentorship and a growth mindset can propel your career forward and enhance your capabilities.

Mistakes to Avoid

Avoiding common mistakes in mentorship and fostering a growth mindset is crucial for achieving success. One major error is failing to take initiative in seeking out mentorship; mentors won't always come to you. Additionally, asking vague questions instead of seeking specific feedback can lead to unproductive conversations. Comparing your progress to others can also be detrimental; it's essential to focus on your unique journey. Lastly, disregarding constructive feedback can stunt your growth and development. By being aware of these pitfalls, you can enhance your mentorship experience and foster a more effective growth mindset.

Pro Tips

Implementing effective pro tips can enhance your mentorship experience and growth mindset. First, actively seek out mentors by reaching out with specific requests for guidance. Demonstrate your commitment to growth by sharing your progress and implementing their advice. Regularly reflect on your experiences and document lessons learned to track your development over time. Additionally, engage with a community of peers to share insights and foster collaboration. These strategies can significantly enhance your learning and development in sales.

Checklist

Maintaining a checklist for your mentorship and growth strategies can help you stay organised and focused. Include tasks such as identifying potential mentors, scheduling regular check-ins, and maintaining a failure journal. Regularly review your goals and progress to assess your development and make adjustments as needed. Additionally, engage with a community of peers to share insights and learn from one another. A structured checklist will help streamline your growth efforts and enhance your overall effectiveness.

Why This Matters

Understanding the importance of mentorship and a growth mindset is essential for achieving long-term success in sales. Sales can be a challenging profession, often filled with rejection and uncertainty, which can take a toll on your confidence. However, with the right support and mindset, you can transform these challenges into opportunities for growth. Mentors can offer insights and strategies that help you navigate obstacles and improve your performance. By fostering a growth mindset and seeking mentorship, you can build a strong foundation for your career and achieve your goals.

Framework: Building a Growth System That Works

Creating an effective growth system involves a combination of mentorship, structured reflection, and strategic goal-setting. Start by identifying potential mentors who can guide you through your professional journey, whether they are internal colleagues or external industry leaders. Establish regular check-ins to discuss wins, challenges, and next steps, using a structured framework to keep conversations focused. Additionally, maintain a failure journal to document setbacks and lessons learned, fostering a mindset of continuous improvement. Finally, surround yourself with proven individuals who inspire you to elevate your performance and push your boundaries.

Examples

Real-life examples can illustrate the impact of mentorship and a growth mindset on sales success. For instance, a sales representative who sought guidance from a top-performing mentor reported a significant increase in their performance after implementing the strategies discussed during their sessions. Another example involves a team that adopted a growth mindset approach, viewing challenges as learning opportunities, which resulted in improved collaboration and higher sales targets being met. These case studies highlight the tangible benefits of prioritising mentorship and personal development in driving sales success.

Case Story

Transitioning from Features to Outcomes. One of the first cold emails I ever crafted began with: “Let me demonstrate our platform.” I sent out over 50 of these and received no responses. Then I modified one line: “We assisted a SaaS VP in reducing churn by 20% in just 6 months.”

Responses started pouring in almost right away. Same product. Same target audience. Entirely different approach. That’s when I understood something crucial: Prospects are not interested in what you do; they care about what it can do for them. The transition from selling features to selling outcomes marked a significant turning point in my sales journey. Once you grasp this concept, you’ll experience the same improved conversations, an increase in meetings, and quicker trust-building

Module 9: Pitch – Elevator – Role Play – Feedback – Speech Speed

"Be clear, be brief, be gone."

Why This Matters

Your pitch is your initial impression, and in sales, first impressions are crucial. When you deliver a strong pitch, prospects are more likely to engage with you. If you start to ramble or provide excessive detail, you risk losing their attention immediately. I experienced this firsthand. In the early stages of my career, I would jump into calls and attempt to convey everything in one go — all features, all benefits, all reasons we were “the best.” The outcome? People lost interest.

I was speaking at them rather than having a conversation. Everything shifted when I streamlined my approach. I reduced my pitch to 30 seconds, emphasised results, and practised until it felt effortless. My confidence increased, my discussions flowed better, and my meeting conversion rates improved dramatically. Mastering the pitch is not about speaking more quickly or pushing harder to sell — it’s about achieving clarity, maintaining control, and exhibiting composure.

Framework: The 4 Elements of a Powerful Pitch

Your presentation should appear seamless, which is achieved through a solid framework. Consider it like a rhythm — four distinct beats that connect smoothly: 1. Elevator Pitch (30 seconds). If you needed to describe your work during a brief elevator ride with a potential client, would you be able to? That’s your elevator pitch.

Use this structure:

I assist [target audience] facing [challenge] to attain [desired outcome] by implementing [approach]." Example: "I support eCommerce businesses dealing with high cart abandonment rates to boost conversions by 15% in 3 months through enhanced user experience and targeted follow-ups. Would you be open to discussing this further?."

Role Play Weekly (I used to hate this, FYI)

Sales is akin to a performance sport, requiring you to practice under pressure. Make role-playing an essential part of your routine. Team up with a colleague or mentor. Choose a scenario such as a cold call, handling objections, or starting a demo. Alternate roles, with one person acting as the prospect and the other as the representative. Seek genuine feedback instead of just polite responses. Initially, I found role-playing with my team uncomfortable, but that discomfort fostered growth. Each week, we focused on different aspects like tone, objection management, or overall flow. Within a month, we saw significant improvements in our delivery. Now, I genuinely enjoy engaging in role plays. A helpful tip: record your sessions and listen to them later. You'll identify filler words like "um," "basically," or "to be honest" that can undermine your authority.

Feedback Loop

You can only enhance what you track. After each pitch—whether real or practised—consider these three straightforward questions: Was I clear? Did I convey confidence? Was I focused on outcomes? You can incorporate this into your weekly one-on-ones with your manager or mentor. Here's how to gather valuable feedback: Request one thing you did well and one area for improvement. Pay attention to delivery (pace, tone, clarity) as much as to the content. Note your key takeaways and review them before your next pitch. Feedback is not criticism; it's a source of free improvement.

Speech Speed & Tone

A great pitch can lose its impact if delivered too quickly or in a mechanical manner. Strive to maintain a pace of 150 to 160 words per minute. It should feel conversational, steady, and assured. Speaking any faster may come off as anxious, while a slower pace may convey uncertainty. Here are some tips for managing your speech speed: Record yourself to monitor the timing of your pitch. Pause naturally after presenting your value statement. Smile while you speak; it instantly enhances your tone. Slightly lower your volume at the conclusion of important points; this conveys authority. Keep in mind: Your voice is your tool. Mastering its control is essential.

Examples

Standard Pitch (30 seconds):

I assist SaaS leaders who are struggling with churn in decreasing customer loss by 20% within six months by implementing more effective retention workflows. Would it make sense to discuss this further?

Objection Handling Example:

Prospect: "We already have a solution." You: "That's wonderful. May I ask what influenced your decision to go with them? (wait for the response) If you could adjust one aspect of its performance, what would that be?"

Networking Example:

"I work with sales teams who are struggling to hit pipeline targets. We help them double meeting volume within 90 days."

LinkedIn Message Example:

“Hi [Name], we recently helped [company type] achieve [result]. I thought it might be relevant to your team — open to a quick chat?”

Pro Tip: Always end your pitch with a clear next step. Never leave it open-ended.

Mistakes to Avoid

Avoid exceeding 60 seconds. If you can't summarise your work in under a minute, you may not fully grasp it. Avoid speaking too quickly. Nervousness can lead to rushing practice and deep breathing before your call. Never skip practice. Trying to "wing it" is not a sign of confidence; it shows a lack of preparation. Avoid sounding robotic. A strong pitch should feel practised but natural, aiming for polished, not flawless. Steer clear of complexity. Use clear, straightforward language and focus on results, avoiding technical jargon.

Pro Tips from the Field

Record yourself weekly. Initially, you may feel uncomfortable; that's a sign of growth as you become aware of your audience's perception. Create three variations of your pitch: For Phone – Keep it casual and brief. For LinkedIn, use a friendly message format. For Networking – Be quick, confident, and personable. Observe high achievers. Pay attention to how your top colleagues initiate calls and adopt their style, not their exact words. Monitor what resonates.

Make a note of phrases that generate engagement and focus on those. Continue to adapt. Your pitch should never feel complete; it should change alongside your market, ideal customer profile, and personal growth. Checklist: Develop three pitch versions (phone, LinkedIn, networking). Practice your 30-second pitch daily. Engage in role-play at least weekly. Record and review one pitch every Friday. Track phrases that receive positive feedback. Maintain a speaking rate of under 160 words per minute.

Case Story: Clarity Converts

I once had a VP who gave me 15 minutes after hearing just my 30-second pitch.

He said, “You got straight to the point, no fluff — I respect that.”

That meeting turned into a **six-figure deal**.

That moment reinforced what I now teach every rep:

Clarity creates confidence, and confidence creates conversions.

“The best salespeople don’t talk more — they talk better and listen more.”

When your pitch is clear, concise, and outcome-driven, prospects listen. They lean in. And that’s when the real sales conversation begins.

Module 10: Mentor – Growth Mindset – Proven People

"You don't rise to the level of your goals. You fall to the level of your systems." – James Clear

Why This Matters

Sales will test you.

Rejection, pressure, and uncertainty are inherent to the job. Without support, these challenges can overwhelm you. However, with the right mindset and guidance from mentors, they can help you grow. Understand the struggle, the difficult months, the unmet goals, the moments of self-doubt.

What helped me persevere was not luck or innate talent, but the insights I gained from those who had faced similar challenges. One of my early mentors, a Senior Account Executive who consistently exceeded his targets, shared three simple pieces of advice that helped me double my meetings in just one week:

1. Take your time with your pitch.
2. Pause after delivering your value statement.
3. Always confirm the next step before ending the call.

These may seem like small tips, but they led to significant outcomes. That illustrates the value of mentorship. Sales is a skill you can master, but growth requires intention. It comes from systems, self-reflection, and the encouragement of those who motivate you to improve.

Framework: Building a Growth System That Works

Find a Mentor

Your mentor doesn't need to be your supervisor. It could be someone within your organisation, such as a high-achieving account executive, a respected manager, or an external figure like a sales coach, community leader, or an individual you admire on LinkedIn.

The key is that they have experience in the journey you're undertaking and are ready to provide guidance.

Internal Mentors: Consider asking your manager, a top-performing colleague, or an account executive if they would be willing to meet weekly. Concentrate on areas where you need improvement, such as handling objections, formulating discovery questions, or managing calls.

External Mentors: Connect with potential mentors on LinkedIn.

"Hi [Name], I really admire how you handle [specific skill]. I'm working to improve in that area. Would you be open to a quick 15-minute chat?"

Join online groups or communities (RevGenius, Pavilion, Sales Confidence).

Pro Tip: Don't wait for mentors to appear. Ask. Show them you're serious about growth.

Weekly Check-Ins: Structure for Success

Mentorship without structure becomes a chat. Structure turns it into progress.

Use the 2 Wins – 2 Challenges – 1 Action framework every week:

- 2 Wins: What went well?
- 2 Challenges: Where did you struggle?
- 1 Action: What's your focus for next week?

This keeps conversations focused and measurable.

It also builds momentum — you and your mentor both see your growth in real time.

Example:

"This week, I booked 4 meetings and improved my opener. My challenge was closing the next steps. Next week, I'll work on using trial closes more often."

Small, consistent improvement > random big breakthroughs.

Growth Mindset: How You Think Determines How You Sell

A growth mindset is what separates salespeople who quit from those who become leaders.

Rejection isn't failure, it's feedback.

When something goes wrong, don't think:

"I'm not good at this."

Think:

"What can I learn from this?"

Start a Failure Journal, a simple document or Excel tab where you record every loss, rejection, or objection, and what you learned from it.

Example entry:

Date	Failure / Rejection	Lesson Learned	Adjustment for Tomorrow
12/10	VP hung up after opener	Opener too generic	New personalised hook tomorrow

Over time, this journal becomes a blueprint of your growth — showing how far you've come and how you respond under pressure.

Pro Tip: Celebrate effort, not just results. Did you make 60 calls even though it was a tough day? That's progress.

Surround Yourself with Proven People

Your environment shapes your standards.

If you surround yourself with ordinary people, you'll adopt average habits.

Follow and learn from proven performers, not the loudest voices online, but the most consistent ones.

Here's how to build your "proven people circle":

- Follow 5–10 top sales leaders on LinkedIn (think: Morgan J Ingram, James Ski, Jeb Blount).
- Engage with their posts daily, and comment thoughtfully.
- Join Slack or Discord groups where top performers share tactics.
- Attend webinars and ask questions. Visibility builds relationships.

Eventually, you'll start learning how they think, not just what they do.

Ashraf's Tip:

When I was building my first £1M+ pipeline, I didn't know everything, but I surrounded myself with people who did. I listened more than I spoke, copied their habits, and applied what worked.

That environment shaped my success.

Mistakes to Avoid

Don't wait for mentors to show up; you must take the lead yourself. Avoid seeking vague "advice." Instead, try asking: "Could you evaluate my last three calls and provide feedback on my tone and pace?" Don't compare your beginning to someone else's successes. You're looking at their chapter 10 while you're in your chapter 1. Focus on your own journey. Don't dismiss feedback just because it's uncomfortable. Feedback is often painful because it reveals the truth, which is what makes it valuable.

Pro Tips from the Field

Connect with 2 to 3 potential mentors this week. Be genuine, concise, and specific in your approach. Focus on showcasing progress rather than just highlighting problems. Mentors appreciate working with individuals who take action on their advice and provide feedback. Publicly celebrate your achievements. Sharing small wins helps build your brand and draws in new mentors.

Review your failure journal each month. Look for recurring themes. Are you making progress, repeating mistakes, or avoiding the same challenges? Start giving back early. You don't need to be in a senior position to mentor someone. If you're just a step ahead, you can help someone else along their journey.

Checklist

- Identify 2 mentors (internal & external).
- Schedule weekly 2 Wins – 2 Challenges – 1 Action reviews.
- Start a failure journal.
- Follow 10 proven sales leaders on LinkedIn.
- Join one online sales community.
- Celebrate progress weekly.

Case Story: The Mentor Who Doubled My Pipeline

I'll never forget my first real mentor, a senior AE who quietly crushed targets every quarter. One day, I asked him what his secret was.

He smiled and said, "Slow down. Use silence. And never end a call without a next step."

I thought it sounded too simple. But I tried it.

Within a week, my pipeline doubled.

Those lessons stuck with me for life, not because they were complicated, but because they worked. Mentorship doesn't give you shortcuts; it gives you clarity. It compresses time by letting you learn in months what others took years to master.

Surround yourself with people who make you uncomfortable, people who make you stretch, reflect, and raise your standards. Because in sales, as in life, you don't rise to the level of your goals. You rise to the level of your mentors and your mindset.

Module 11: Pick Up the Phone – Cold Calling – Control the Fear

Cold calling can be intimidating for many sales professionals, yet it remains one of the most effective methods for generating leads and building relationships. The fear associated with cold calling often stems from the anticipation of rejection or negative responses. However, understanding that cold calling is not about pestering prospects but rather about offering solutions can help alleviate this anxiety. Embracing the challenge and committing to regular cold calling sessions can significantly enhance your confidence and effectiveness. Ultimately, learning to control your fear is essential for thriving in sales.

Why This Matters

Recognising the importance of cold calling in the sales process is crucial for achieving success. Cold calling enables you to connect directly with prospects, allowing for real-time engagement and relationship building. Avoiding the phone can limit your outreach and reliance on less direct methods, such as emails. By embracing cold calling as a valuable tool, you take control of your sales process and increase your chances of generating leads. Ultimately, mastering cold calling techniques is an essential skill for any successful sales professional.

Framework: How to Turn Fear Into Confidence

Developing a framework to transform fear into confidence when cold calling can significantly enhance your effectiveness. Start by adopting a pre-call mindset that emphasises your role in helping prospects rather than bothering them. Before each call, take a moment to breathe deeply, smile to project positivity, and remind yourself of the value you bring. Structuring your calls with a clear introduction, permission to continue, value statement, qualifying questions, and a call to action can lead to more productive conversations. Lastly, consistent practice and reflection will help reinforce your confidence over time.

Examples

Real-world examples can highlight successful cold calling techniques. For instance, a sales professional who adhered to a structured call framework reported increased engagement and a higher rate of booked meetings. Another example involves a team that implemented a practice of logging objections and responses, which led to improved confidence and success in overcoming common challenges. These case studies demonstrate the effectiveness of adopting a structured approach to cold calling.

Mistakes to Avoid

Being aware of common mistakes in cold calling can enhance your effectiveness. One significant error is apologising for your call, which can undermine your confidence and make you appear less professional. Additionally, monopolising the conversation instead of fostering a dialogue can lead to disengagement from prospects. Quitting after encountering a single objection is another common pitfall; persistence is often key to securing meetings. By recognising and avoiding these mistakes, you can improve your cold calling success.

Pro Tips

Implementing effective pro tips can greatly enhance your cold calling success. First, stand up while calling to increase your energy and engagement. Consider recording a couple of calls each week for review, allowing you to assess your tone and clarity. Treat rejection as a learning opportunity, similar to building muscle in the gym, where each “no” strengthens your resolve. Lastly, warm up before making calls with a practice pitch or deep breaths to alleviate anxiety. These strategies can significantly improve your cold calling performance.

Checklist

Maintaining a checklist for your cold calling activities can help keep you organised and focused. Include tasks such as blocking out dedicated time for calls, preparing responses to common objections, and tracking your call-to-meeting ratio. Regularly reflect on your learning after each call block to assess your performance and identify areas for improvement. Additionally, ensure that you celebrate small victories to maintain motivation. A structured checklist will streamline your cold calling efforts and enhance your overall effectiveness.

Case Story: Fear Turned Into Fuel

On my first experience with a 50-call block, I was filled with trepidation. My voice shook, my palms were sweaty, and I fumbled my opener more times than I'd like to admit. Despite my nerves, I successfully booked two meetings out of those 50 calls. While that translates to a 4% success rate, it marked the beginning of my journey in sales. Those two meetings led to valuable conversations, which in turn cultivated my confidence and propelled my career forward. I learned that cold calls are not to be feared; they are opportunities awaiting courageous sales professionals.

Module 12: Books & Podcasts (Continuous Learning)

The importance of continuous learning through books and podcasts cannot be understated in the field of sales. This module serves as a reminder that while practical skills are essential, ongoing education is equally vital for sustained success. Sales professionals who commit to lifelong learning often find themselves better equipped to navigate the evolving landscape of their industry. Engaging with proven experts through literature and audio content can provide fresh perspectives and strategies that can be immediately applied. Ultimately, a dedication to continuous learning lays the groundwork for resilience, adaptability, and long-term achievement.

Why This Matters

Understanding the significance of continuous learning is fundamental for thriving in sales. The landscape is constantly changing, with new trends, technologies, and consumer behaviours emerging regularly. Those who treat sales as a career rather than just a job are more likely to excel and adapt over time. By investing time in reading and listening to industry-leading content, you equip yourself with the knowledge to stay ahead of the curve. This commitment to learning fosters resilience and lays the foundation for growth and opportunity in your sales career.

Framework: Building a Continuous Learning Habit

Daily Learning Habit

Integrating learning into your daily routine is essential, just like making calls or sending emails. Begin with manageable goals, such as dedicating just 20 minutes a day to this practice. The key is consistency and making it a priority in your schedule. By setting aside this time daily, you can progressively cultivate a habit that enhances your knowledge and skills. Remember, small, consistent efforts lead to significant long-term improvements.

Here's a simple approach to structure your daily learning:

- Morning: Read 10 pages of a relevant sales book to kickstart your day with new insights.
- Commute: Listen to one episode of a sales podcast, turning travel time into a learning opportunity.
- Evening: Journal three key takeaways from what you learned throughout the day, reinforcing your understanding.

Additionally, maintain a log using an Excel sheet or a notebook to track your learning progress.

Document the date, source of your learning, key lessons, and actionable steps to implement:

Date	Source	Lesson	Action
17 Oct	30MPC Podcast	Use LinkedIn + email to confirm meetings	Try on Friday's demos

Ashraf's Rule: If you're not learning, you're plateauing.

Starter Book List

You don't need an extensive library of 100 books; instead, focus on a select few that can fundamentally change your perspective and approach to sales. Quality is far more significant than quantity when it comes to impactful reading. The following titles are recommended as starting points:

Start with these:

***Fanatical Prospecting* – Jeb Blount**

Learn the discipline of activity, pipeline consistency, and how effort today equals results in 30 days.

***The Challenger Sale* – Matthew Dixon & Brent Adamson**

Master the art of teaching, tailoring, and taking control of conversations with your prospects.

Gap Selling – Keenan

Understand how to deeply diagnose customer problems and effectively sell solutions that genuinely close the gap.

Atomic Habits – James Clear

Learn the science of habits and the systems that facilitate automatic growth and improvement.

To Sell Is Human – Daniel Pink

Gain insights into the psychology of persuasion, motivation, and effective communication strategies.

Podcasts: Learning on the Go

Podcasts serve as your portable mentors, allowing you to absorb knowledge and insights daily while commuting, walking, or during breaks between meetings. This format is not only convenient but also engaging, making learning enjoyable. By integrating podcasts into your routine, you can continuously refine your skills and stay updated with industry trends.

Here are some top podcast picks:

- 30 Minutes to President's Club – Offers tactical advice without fluff.
- Sales Hacker Podcast – Features real-world B2B conversations that provide practical insights.
- Make It Happen Mondays (John Barrows) – Delivers motivational and actionable content.
- The Advanced Selling Podcast – Shares proven mindset and communication tips for sales success.
- The Founder Academy Podcast (coming soon) – My own take on real sales experiences and frameworks.

Pro Tip: Treat podcasts as practice sessions. Pause during episodes, jot down one idea, and apply that insight the same day.

Apply What You Learn

Learning without putting that knowledge into practice is ultimately wasted time. Each time you read or listen, it is crucial to capture at least three takeaways and one actionable step for implementation. This will help solidify the concepts in your mind and ensure that you are actively integrating new information into your day-to-day practices.

Then, compile these insights into your “Playbook of Lessons” — your personal sales bible that guides your actions and decisions moving forward.

Example:

From *Fanatical Prospecting*: “Activity today fills the pipeline in 30 days.”

Action: Block one hour of cold calls daily for the next four weeks.

From *30MPC*: “Confirm every meeting via LinkedIn + email.”

Action: Integrate this into my meeting process — as a result, I achieved a 100% show rate this week.

Pro Tip: Revisit your Playbook monthly to refresh your memory and reflect on your progress.

Mistakes to Avoid

Reading without applying.

Knowledge means nothing without execution.

Consuming too much at once.

Focus on one book or one podcast at a time to fully absorb and apply the content.

Quitting early.

Growth compounds over time; it’s not always instant. Give yourself the time required to see results.

Pro Tips

Read one book per month — prioritise quality over quantity.

Share one insight weekly on LinkedIn to enhance your personal brand.

Revisit your top three books annually — your perspective evolves as you grow.

Maintain a “Quote Bank” — jot down lines that inspire or reframe your thinking.

Mentor others — teaching others reinforces your own learning.

Checklist

- Choose one book to start today.
- Subscribe to three podcasts that interest you.
- Initiate your learning journal or Excel tracker.
- Share one insight weekly to engage your network.
- Conduct a monthly review of your learnings to track your progress.

Case Studies: How Learning Transforms Careers

Case Study 1 – The 30-Day Rule

After reading *Fanatical Prospecting*, I embraced the 30-day rule:

“Activity today fills your pipeline in 30 days.”

By applying this principle, everything changed for me. I shifted my focus from seeking immediate results to emphasising consistent efforts. Thirty days later, my meetings doubled, and for the first time, I felt a sense of control over my pipeline rather than perpetually chasing it.

Case Study 2 – The Power of The Challenger Mindset

A representative on my team once faced challenges with low conversion rates. I recommended he read *The Challenger Sale* and encouraged him to tackle one chapter each day. Two weeks later, I noticed a transformation in his approach. Instead of asking, “Do you have time for a call?” he confidently stated, “Let me show you something you might not have considered.” By challenging the thinking of his prospects, he managed to book more qualified meetings in a single month than he had in the previous three combined.

Case Study 3 – From Burnout to Balance

At one point, I experienced burnout from back-to-back calls, endless emails, and a lack of reflection. Then, I read *Atomic Habits* by James Clear. I realised that I didn’t need to make massive changes; I simply required better systems. I began with one small habit: reading 10 pages before starting work each day. That simple adjustment brought me calm, perspective, and focus. Within a month, my performance improved significantly, and I regained my well-being.

Final Thoughts

I chose to conclude this section with emphasis on learning because it is the most crucial aspect of your sales career. Your ability to learn, adapt, and grow will ultimately define your trajectory in this industry. While skills such as cold calling, pitching, and following up are important, learning itself embodies a mindset that can lead to long-term success. I have built my entire career, ranging from retail floors to corporate boardrooms, on the principles of consistency, resilience, and curiosity.

If you commit to learning every day, even in small increments, you will not only construct a successful career but also create a life filled with freedom, impact, and opportunity. Sales is not just about learning how to sell to others; it also teaches you how to sell yourself effectively.

Conclusion: From Playbook to Practice

"Information isn't power. Implementation is." – Ashraf Hussain

You have just completed 12 modules that collectively form the foundation of a successful sales career, covering critical areas such as metrics, analytics, branding, prospecting, follow-up, pitching, mentorship, and continuous learning.

If you have made it this far, you have already demonstrated something significant in your commitment to growth. However, let me be candid with you.

Reading this Playbook alone is insufficient. True success does not stem from knowledge; it arises from action. You can possess the best scripts, the most organised Excel trackers, and the sharpest templates, but if you do not actively utilise them, they remain mere words on a page. Implementation distinguishes those who merely talk about success from those who actively live it.

This Playbook is not designed to be rushed through. Instead, it serves as your blueprint for transformation over the course of 12 weeks.

Your Action Plan: 12 Weeks to Transform Your Sales Career

Here's how to effectively apply it:

1. **Concentrate on one module each week.**

Since there are 12 modules, this aligns perfectly with a quarter's timeframe. By the end, you will have mastered every skill that a Sales Development Representative (SDR) needs to achieve elite status.

2. **Conclude each week with a period of reflection.**

Ask yourself the following questions:

What worked?

What didn't?

What will I change next week?

This reflection process turns experience into meaningful growth.

1. **Keep track of your progress.**

- Utilise your various trackers — for calls, emails, meetings, and learning logs.
- Observe how your numbers sharpen, your conversations deepen, and your confidence grows.

2. **After completing 12 weeks, take the time to look back.**

Review your pipeline, and you will notice stronger results — not just in terms of numbers but in your personal development as well.

As a result, you will feel more prepared, more confident, and more in control of your sales efforts. This is the essence of mastery.

Don't Follow My Order, Follow Your Weakness

Here's a crucial insight that many people overlook: You are not required to follow the modules in a predetermined order. Everyone has unique starting points based on their individual struggles and experiences.

If your most significant challenge is cold calling, begin with Module 11. Should you lack structure, start with Metrics and Analytics (Modules 1–2). If you feel confident in outreach but struggle with follow-up, jump directly to Module 7. If your mindset has been wavering lately, focus on Mentorship and Growth (Module 10).

Self-awareness is your most potent weapon.

The goal is not to complete the Playbook in order; rather, it is to build your strongest version step by step. You will achieve the best results when you utilise this Playbook as a mirror to identify your blind spots and strengthen them one by one.

Think Long-Term: SDR → Business Development → Account Management → Leadership

This Playbook serves as your starting point, not your finish line. Being an SDR is where you lay the foundation for your career, learning the crucial skills of discipline, persistence, and effective communication. From this point, you will evolve into Business Development, then into Account Management, and ultimately into Sales Leadership.

Every call you make, every follow-up you send, and every rejection you overcome prepares you for greater responsibilities and rewards in your career. I have personally experienced each of these roles, having been the SDR booking meetings, the Business Development professional closing deals, and the Account Manager nurturing high-value clients.

Each role came with its own unique challenges, but they all shared a common goal: to close business and create a meaningful impact.

That is why this Playbook does not just teach you how to sell; it also teaches you how to think like a businessperson.

Final Message: Build the Skills, Systems & Resilience

Sales offers one of the greatest wealth-building career paths available, provided you take it seriously. You do not need a formal degree, extensive connections, or sheer luck. What you require are:

- The skills to sell effectively.
- The systems to maintain consistency in your efforts.
- And the resilience to persevere when others choose to quit.

In sales, you are not compensated for the time you invest; rather, you are rewarded for the results you generate. You are not merely booking meetings; you are in the process of building a fulfilling life.

You are cultivating habits that can lead to financial independence, mental resilience, and professional invincibility. And it all begins here—with the commitment to implementation.

Remember This

You do not have to be perfect to achieve success in sales. Instead, you must demonstrate consistency in your efforts.

Show up each day. Track your numbers diligently. Continue learning and evolving. Seek feedback actively. And most importantly — never stop believing that you are just one call, one conversation, or one “yes” away from changing your life.

Your next step:

Choose one area to focus on, start today, and commit to it for seven days. After completing that week, move on to the next area, and then the next.

In twelve weeks, you will hardly recognise the transformation in yourself.

Bonus Resources

The SDR Excel Tracker Pack

You will also receive twelve simple plug-and-play Excel templates designed to support each module:

- Metrics Tracker
- Analytics Dashboard
- LinkedIn & Event Engagement Tracker
- Prospecting Tracker
- Inbound Leads Tracker
- Meeting Agenda & Follow-Up Log
- Follow-Up Cadence Sheet
- Value Proposition Library
- Pitch & Objection Tracker
- Growth Mindset Journal
- Cold Call Tracker
- Learning Journal

Fill these out daily, review them weekly, and they will help keep you accountable on your journey.

Companion Playbooks

This is part of my **3-part Playbook Series**:

1. **The SDR Success Playbook** (this one) — Build your foundation.
2. **The Business Development Playbook** — Learn to close new business and scale revenue effectively.
3. **The Account Management Playbook** — Master retention, renewals, and account growth strategies.

Together, they form a comprehensive sales career roadmap: **SDR → Business Development → Account Management → Leadership**.

About the Author – Ashraf Hussain

I began my career as an **SDR** — making calls, sending emails, and facing rejection daily. Subsequently, I transitioned into a **hybrid Business Development and Account Management role**, often handling the responsibilities of both simultaneously. This experience compelled me to learn quickly, adapt to various challenges, and always keep my primary goal in focus: **closing business**.

From there, I progressed to the role of **Director**, overseeing teams of SDRs, Business Development Managers, and Account Managers. Throughout my career, I have built million-pound pipelines, achieved renewal rates of 97–99%, and trained teams that consistently surpassed growth targets.

This Playbook is not based on theory; it is **my lived journey** — the systems, lessons, and mindset that have propelled me to success, compiled so that you can shortcut years of trial and error.

Build Your Foundation

Transform your sales career with "SDR Success Playbook," a comprehensive guide that shares proven strategies and frameworks to turn cold prospects into substantial revenue. After a decade of trial and error, Ashraf Hussain reveals the metrics, skills, and resilience needed to excel as a Sales Development Representative. With actionable insights and tools, this playbook empowers you to not just learn, but to implement and achieve lasting success in sales.