

SDR (Sales Development Representative)

Onboarding Template

Week 1: Foundation & Prospecting Basics

Day	Activities	Success Criteria	Time Allocation
1	Company orientation, team introductions, account assignment	Understands company mission, knows team roles, account boundaries clear	6 hours training, 2 hours setup
2	Lead qualification criteria, CRM data entry training, ideal customer profile	Can identify qualified leads, enters data accurately, knows ICP characteristics	4 hours training, 4 hours practice
3	Prospecting methodology, research techniques, LinkedIn training	Demonstrates research process, finds 20 prospects, LinkedIn profile optimized	3 hours training, 5 hours practice
4	Email writing fundamentals, cold outreach templates, A/B testing	Writes effective subject lines, personalizes emails, understands testing	3 hours training, 5 hours writing
5	Phone skills training, voicemail scripts, objection handling	Delivers confident voicemails, handles gatekeepers, books meetings	4 hours training, 4 hours practice

Week 2-4: Skill Development & Activity Ramp

Focus Area	Daily Activities	Weekly Targets	Success Metrics
Prospecting Volume	30 calls, 50 emails, 10 LinkedIn messages	150 calls, 250 emails, 50 social touches	2% email response rate, 1 meeting per 50 calls
Lead Qualification	Practice BANT criteria, update CRM records	Qualify 20 leads, document decision criteria	90% qualification accuracy in manager review
Meeting Setting	Book discovery calls, confirm attendees	Schedule 3 meetings per week	80% meeting show rate, positive AE feedback
Product Knowledge	30-minute daily product training	Complete all training modules	Pass the product quiz with an 85% score

30-60-90 Day SDR Goals

Timeframe	Activity Goals	Quality Goals	Development Goals
30 Days	20 calls/day, 40 emails/day	2 qualified meetings/week	Complete prospecting certification
60 Days	25 calls/day, 50 emails/day	4 qualified meetings/week	Achieve a 15% email response rate
90 Days	30 calls/day, 60 emails/day	5 qualified meetings/week	90% meeting-to-opportunity conversion
