

Notch

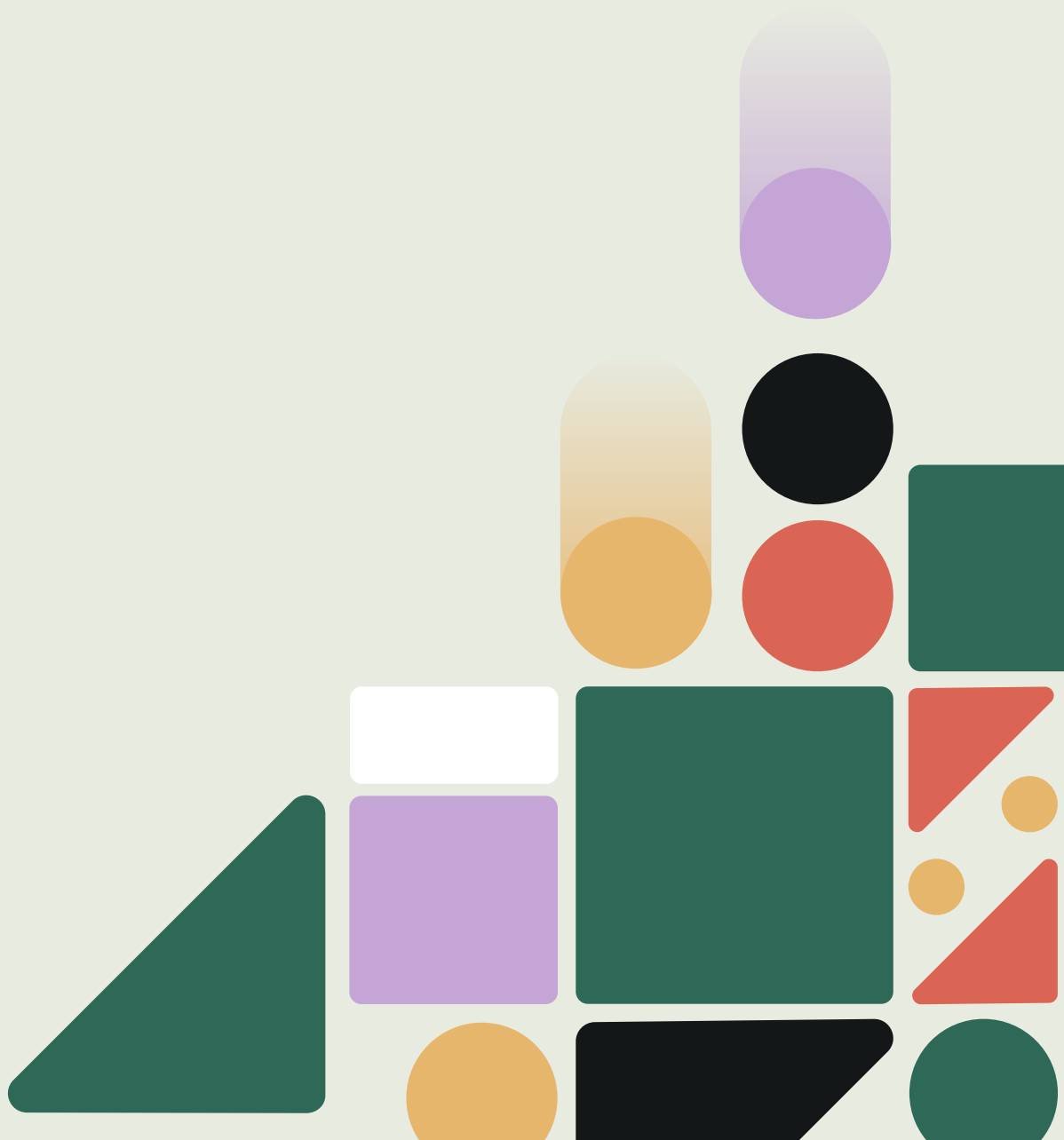
# The New BDR's Guide to Killing It From Day One

## A Brief Checklist



4 min read

notch.so



# Keep those leads coming!

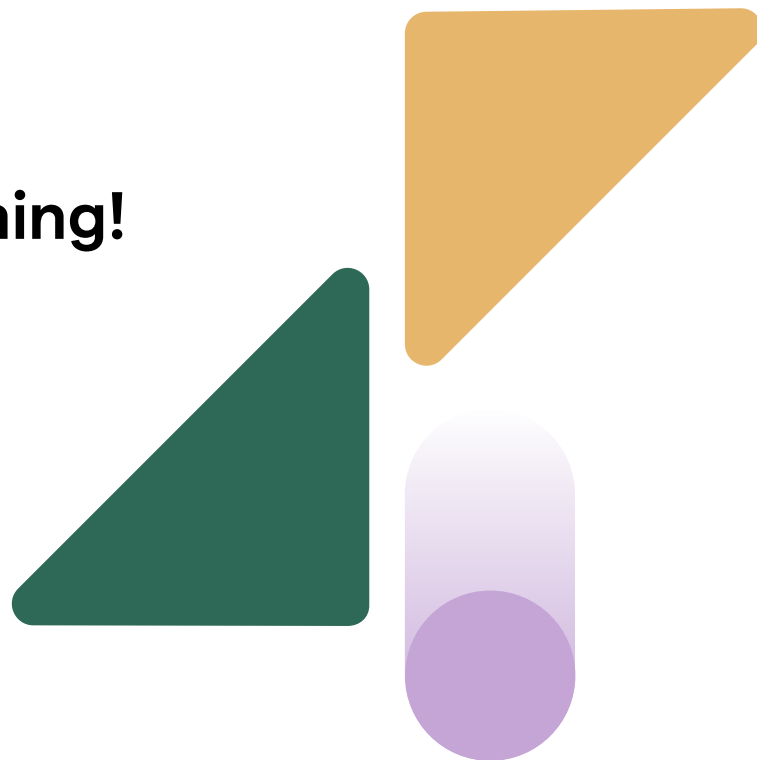
Welcome to „The New BDR’s Guide to Killing It From Day One: A Brief Checklist“!

Congratulations on starting your journey as a Business Development Representative (BDR). This checklist is designed to help you hit the ground running and excel in your role from day one.

As a BDR, you play a crucial role in driving business growth and generating new opportunities for your organization. To succeed in this fast-paced and dynamic field, it’s essential to have a structured approach and a well-defined plan of action. This checklist serves as your go-to resource, providing you with a step-by-step guide to navigate through your daily tasks and responsibilities.

From organizing your workspace to closing deals, this checklist covers the key areas you’ll need to focus on to maximize your effectiveness as a BDR. It includes essential steps such as setting goals and priorities, qualifying leads, making outbound calls, leveraging CRM tools, collaborating with the sales and marketing teams, and more.

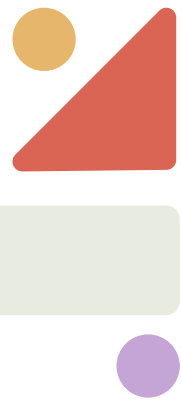
## How to start:



By following this checklist, you’ll be equipped with the necessary framework to streamline your workflow, engage with prospects effectively, and drive meaningful conversations that lead to successful outcomes. It will help you stay organized, manage your time efficiently, and stay on top of your goals and responsibilities.

Remember, success as a BDR requires a combination of skill, determination, and continuous learning. This checklist will serve as a foundation for your growth, providing you with a roadmap to sharpen your abilities and consistently deliver results.

So, whether you’re a seasoned professional transitioning into a BDR role or a new entrant to the world of business development, this checklist will empower you to make a powerful impact right from your very first day.



Crafted with care, our checklist is your personal guide to BDR excellence. Just like the MAP template, it's your companion to quick goal achievement and effective prospect engagement.

**Let's make your journey extraordinary.**

## 1 Organize your workspace

- Ensure you have all necessary equipment, such as a computer, phone, and internet connection.
- Arrange your desk and keep it clean and clutter-free.
- Have any relevant documents or resources readily accessible.

## 2 Organize your workspace

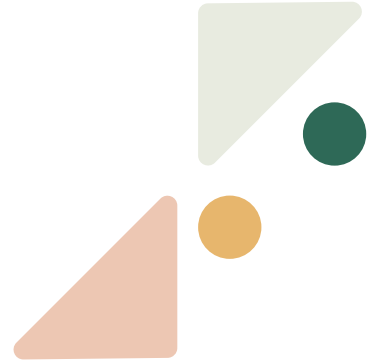
- Identify your daily, weekly, and monthly goals.
- Prioritize your tasks based on urgency and importance.
- Break down larger goals into smaller, actionable steps.

## 3 Manage your emails and messages

- Respond promptly to urgent messages.
- Prioritize and categorize emails for efficient handling.
- Use email management techniques such as inbox folders or labels.

## 4 Review your CRM tasks and lead status

- Log into your CRM system and navigate to your assigned tasks.
- Update lead statuses, notes, and any relevant information.
- Ensure data accuracy and consistency in your CRM records.



## 5 Research and qualify

- Gather information about leads' industries, companies, and pain points.
- Determine the suitability and potential fit of leads for your product or service.
- Use tools like LinkedIn, company websites, and industry reports for research.

## 6 Make outbound calls

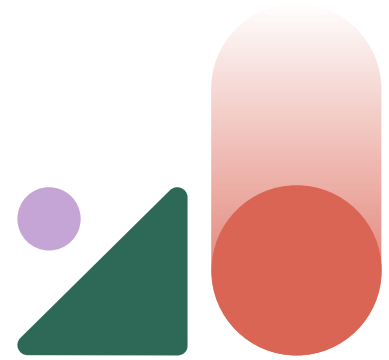
- Prepare a script or talking points for effective communication.
- Focus on building rapport and understanding the prospect's needs.
- Identify potential opportunities and gather relevant information.

## 7 Send follow-up emails and material

- Personalize emails based on the prospect's needs and interests.
- Provide additional information or resources to nurture the relationship.
- Include a clear call-to-action to encourage the next steps.

## 8 Schedule meetings and demos

- Coordinate schedules with prospects and internal team members.
- Send out calendar invites with all the necessary details.
- Confirm meeting or demo attendance and ensure everyone is prepared.



## 9 Collaborate with your sales team

- Maintain open communication channels with the sales team.
- Share lead information, updates, and insights
- Coordinate efforts to ensure a smooth transition from BDR to sales

## 11 Participate in training and development

- Attend relevant training sessions or webinars.
- Read industry blogs, books, or articles to enhance your knowledge.
- Seek feedback from colleagues or managers to improve your skills.

## 10 Track and analyze your activities

- Document each call made, email sent, and meeting scheduled.
- Use CRM or tracking tools to log your activities.
- Analyze data to identify trends, assess performance, and make improvements.

## 12 Work with the marketing team

- Align messaging and campaigns with the marketing team.
- Provide feedback on lead quality and suggest improvements.
- Share insights on customer preferences and pain points.

# Keep those leads coming!



## 13 Network and build strong relationships

- ☐ Attend industry events, conferences, or webinars.
- ☐ Engage in conversations and exchange contact information.
- ☐ Follow up with new connections to nurture relationships.

## 15 Next day planning

- ☐ Evaluate your achievements, challenges, and areas for improvement.
- ☐ Reflect on what worked well and identify areas for growth.
- ☐ Create a to-do list for the next day to start with a clear focus.

## 10 Stay organized and manage your time

- ☐ Use productivity tools such as calendars, to-do lists, or project management software.
- ☐ Prioritize tasks based on urgency and importance.
- ☐ Allocate dedicated time blocks for specific activities.



## Fantastic Work! Checklist Conquered!

You've nailed it! Every item checked off means you're primed for success.



# Use Notch to kick off your BDR journey the right way!

This cheat sheet is just a companion and it won't do the trick without using the best technology to keep your prospects engaged from the get-go. **That's why we created Notch.**

Notch is a revenue delivery platform where buyers and sellers can interact on different components of the deal, all while putting the focus on the buying experience – from the first outreach to becoming a fully onboarded account and happy customer. Notch frees up revenue teams to focus on their highest-value work, allowing the entire business to move faster. BDRs can speed up prospecting with powerfully branded spaces and sales teams get to stop using multiple tools such as email, Slack, Notion, Loom, and DocuSign that only overwhelm their prospects.

## Why you should choose Notch!



With Notch, everything sellers and buyers need to know and do is all in one place, creating a truly seamless sales experience from day 1!

## Discover the future of sales!

Get a demo or explore Notch and get ready for the sales and buying process that puts you in the driver's seat!



Viktor Kessel

[Book a Demo — it's free!](#)

# Notch

Leave spreadsheets and lost buyer follow-up emails in the past. Notch helps you create structured and engaging sales process that ensures your buyer completes the right tasks at the right time.

