B2B SALES ENABLEMENT

Account Based Marketing BDR Checklist.

Ask these questions to ensure your BDR processes are aligned with your ABM goals.

Account assignment.

- How are accounts currently assigned to BDRs? Is it based on territory, account type, or an inbound vs. outbound focus?
- Are there any documented processes or guidelines for account assignment that the team consistently follows?
- From their perspective, what are the current challenges or pain points associated with the existing account assignment strategy?

LISTEN FOR:	ACTION TO TAKE:
Overlapping territories.	Assign a dedicated BDR to each territory.
Lack of clarity on inbound vs. outbound responsibilities.	Redefine compensation for outbound efforts—incentivizing the proactive engagement critical for ABM.
Uneven distribution of high-potential accounts.	Collaborate on alternative assignment models, such as vertical-based or tier-based assignments.

Lead routing.

- Can you walk me through the current lead routing process? What systems or tools are involved?
- What are the different lead sources (e.g., website forms, event leads), and are they handled differently based on their origin?
- How does the team currently manage their time and prioritize between working inbound versus outbound leads?
- Are there any Service Level Agreements (SLAs) in place for BDR lead response times? If so, can you share the documentation?

LISTEN FOR:	ACTION TO TAKE:
Leads fall through the cracks because there is no clear lead assignment.	Explore automation tools, such as LeanData, Chili Piper, that automate routing and clearly define lead ownership.
Lack of clarity about how to prioritize or approach leads from different lead sources.	Define specific response times and attempted contact numbers for each lead source category.
Unclear what happens to a lead once it's in your CRM.	Implement a sales execution platform, such as Apollo.io, Outreach, or Salesloft, to ensure consistent tracking of Sales outreach.

Inbound vs. outbound efforts.

- How is the BDR team structured, or how do individual BDRs typically allocate their time between inbound and outbound lead handling?
- For outbound activities, how do BDRs currently track their efforts (e.g., calls made, emails sent, social selling interactions)? What specific tools are they using?
- What key metrics are currently used to measure both the activity and effectiveness of the BDRs' outbound efforts?

LISTEN FOR:	ACTION TO TAKE:
Difficulty balancing the immediate demands of inbound leads with the strategic, longer-term focus required for outbound efforts.	Assign a dedicated BDR to each territory.
Lack of standardized tracking for outbound activities.	Establish outcome-focused KPIs for outbound, such as qualified meetings booked or pipeline generated.
Unsure what mix of outbound activities are truly the most effective.	Review outbound outreach data (ideally in your sales orchestration tool) to determine patterns.

Incentivizing success.

- Are BDRs currently incentivized beyond their base salary?
- If so, what are the specific incentives? (e.g., bonuses for qualified opportunities, meetings booked, deals closed)
- If no formal incentives are currently in place, what are your thoughts on potential incentive models that could motivate the team? Getting their feedback is crucial for buy-in.

LISTEN FOR:	ACTION TO TAKE:
I receive better incentives for inbound than outbound leads. of inbound leads with the strategic, longer-term focus required for outbound efforts.	Assign a dedicated BDR to each territory.
I get incentivized for a specific volume of activity counts.	Establish outcome-focused KPIs for outbound, such as qualified meetings booked or pipeline generated.

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