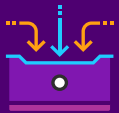


Account Based Marketing BDR Checklist.

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:

- ✖ Overlapping territories.
- ✖ Lack of clarity on inbound vs. outbound responsibilities.
- ✖ Uneven distribution of high-potential accounts.

ACTION TO TAKE:

- ✔ Assign a dedicated BDR to each territory.
- ✔ Redefine compensation for outbound efforts— incentivizing the proactive engagement critical for ABM.
- ✔ 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?

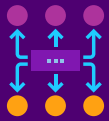


LISTEN FOR:

- ✖ Leads fall through the cracks because there is no clear lead assignment.
- ✖ Lack of clarity about how to prioritize or approach leads from different lead sources.
- ✖ Unclear what happens to a lead once it's in your CRM.

ACTION TO TAKE:

- ✔ Explore automation tools, such as LeanData, Chili Piper, that automate routing and clearly define lead ownership.
- ✔ Define specific response times and attempted contact numbers for each lead source category.
- ✔ 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?

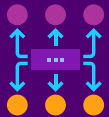


LISTEN FOR:

- ✗ Difficulty balancing the immediate demands of inbound leads with the strategic, longer-term focus required for outbound efforts.
- ✗ Lack of standardized tracking for outbound activities.
- ✗ Unsure what mix of outbound activities are truly the most effective.

ACTION TO TAKE:

- ✓ Assign a dedicated BDR to each territory.
- ✓ Establish outcome-focused KPIs for outbound, such as qualified meetings booked or pipeline generated.
- ✓ 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:

- ✗ I receive better incentives for inbound than outbound leads. of inbound leads with the strategic, longer-term focus required for outbound efforts.
- ✗ I get incentivized for a specific volume of activity counts.

ACTION TO TAKE:

- ✓ Assign a dedicated BDR to each territory.
- ✓ Establish outcome-focused KPIs for outbound, such as qualified meetings booked or pipeline generated.

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