dijital team

The Complete Guide to

Hiring an Offshore SDR

A practical guide for MSP owners to recruiting, onboarding and managing an offshore Sales Development Representative who creates qualified opportunities.

9	17	3	90
parts	chapters	worksheets	day onboarding plan

dijitalteam.com



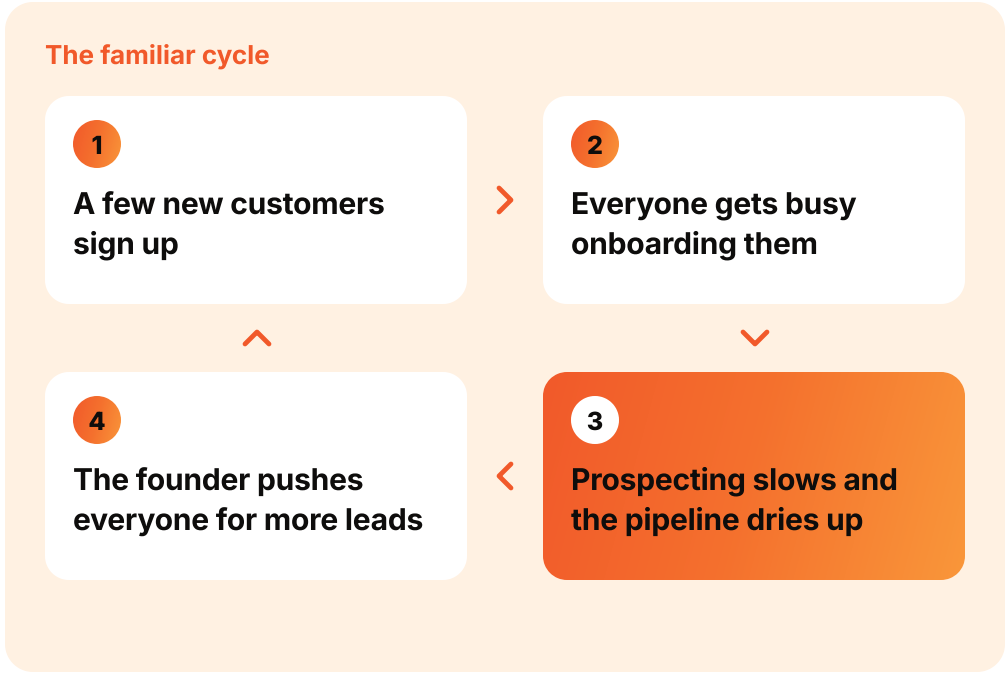
The missing piece in your MSP growth strategy

Most MSPs deliver IT services brilliantly. Winning new business, consistently, is harder.

Sales is often founder-led. Your Business Development Manager (BDM) spends too long researching prospects and chasing follow-ups, marketing leads go unqualified, and outbound happens whenever someone finds the time.

The problem isn't that you need more salespeople. You need a more consistent sales development process.

A dedicated Sales Development Representative (SDR) owns that process, from research to booked meetings, and hiring offshore can make the role more affordable. It works with the right person, clear targeting, good processes and tools, strong leadership and measurable expectations.



How to use this guide

Page 3 › Start from the map: nine parts, 17 chapters.

The strip shows where you are. Each tab is a link.

Fill in — Type into checklists, scorecards and worksheets. Acrobat and Reader add up the totals.

‹ Back to the guide on one page

The guide on one page

Nine parts and 17 chapters. Select any part or chapter to go straight to it. ✎ marks a page you can fill in.

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Want an SDR who works as part of your team? Dijital Team provides dedicated offshore SDRs and BDRs for MSPs. **Book a conversation**

1. What does an offshore SDR actually do?

An SDR finds, engages and qualifies potential customers before a formal discovery meeting, then hands the right ones to a salesperson.

1 Prospect research
Find businesses that match your Ideal Customer Profile (ICP) and research the decision-makers.

2 Outbound prospecting
Engage the right prospects by phone, LinkedIn and permitted email.

3 Lead qualification
Understand challenges, technology needs, commercial potential and timing.

4 Appointment setting
Book qualified discovery meetings with your BDM, Account Executive or owner.

5 CRM management
Record every interaction, next action and follow-up.

6 Pipeline support
Keep prospects nurtured so opportunities don't go cold.

The SDR's job is to create qualified opportunities. Your sales team's job is to convert them into profitable customers.

Part 1

Understanding the role

At the end of this part you will know what an offshore SDR does and doesn't do, whether you need an SDR or a Business Development Representative (BDR), and where the role fits.

In this part

1 What an offshore SDR does 4
SDR or BDR, and where it fits 5

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SDR or BDR, and where the role fits

The two titles are often used interchangeably. This is a common distinction.

SDR	BDR
Mainly inbound lead qualification	Mainly outbound opportunity generation
Follows up marketing enquiries	Identifies target accounts
Qualifies existing interest	Proactively creates conversations
Nurtures leads	Researches and engages new prospects
Books qualified meetings	**Books qualified meetings**

Many smaller MSPs start with a hybrid SDR and BDR role covering both. **The title matters less than clear responsibilities and expected outcomes.**

Not the SDR's job

- ✕ Designing complex managed IT solutions
- ✕ Detailed technical assessments
- ✕ Sophisticated commercial proposals
- ✕ Negotiating major managed services agreements
- ✕ Closing complex opportunities
- ✕ Writing your entire sales strategy

These belong to your experienced sales, technical and commercial leaders.

Where an SDR fits in your sales process

Marketing or target account research → **SDR qualification** → BDM discovery → Solution and proposal → Customer acquisition

With the roles separated, senior salespeople spend more time on high-value conversations while the SDR keeps prospecting consistent.

Back to Part 1

2. Why MSPs are hiring offshore SDRs

Cost is one of the biggest barriers for smaller MSPs, and an onshore salesperson costs far more than a salary.

1 **Better acquisition economics**
Often a lower employment cost than an equivalent onshore role. Where performance is comparable, customer acquisition cost falls.

2 **Consistent prospecting**
Research, outreach and follow-up continue while your founder and BDM are busy with customers and proposals.

3 **More senior selling time**
Your experienced salespeople spend their time on discovery, commercial conversations and closing.

4 **A scalable sales function**
Prospecting becomes a repeatable process you can add capacity to.

5 **Less founder dependency**
New opportunities stop relying on the founder finding the time.

Offshoring can reduce the cost of executing your sales development strategy. It doesn't replace the need to have one.

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Part 2

The business case

At the end of this part you will know what an offshore SDR can do for your MSP, and you will have a readiness score out of 10.

In this part

2 Why MSPs hire offshore SDRs 6
3 Are you ready to hire? 7

3. When is your MSP ready to hire?

Fill in on screen or print

Score one point for each statement you can confidently answer yes to.

#	Readiness statement	Your answer
1	We have a defined ICP.	◯ Yes ◯ No
2	We understand our differentiated value proposition.	◯ Yes ◯ No
3	We have an established managed services offering.	◯ Yes ◯ No
4	We know our minimum acceptable customer economics.	◯ Yes ◯ No
5	We have a CRM with defined sales stages.	◯ Yes ◯ No
6	We have someone responsible for closing deals.	◯ Yes ◯ No
7	We can provide weekly sales coaching.	◯ Yes ◯ No
8	We have an appropriate prospecting technology stack.	◯ Yes ◯ No
9	We have approved contact and compliance processes.	◯ Yes ◯ No
10	We have capacity to onboard new customers.	◯ Yes ◯ No

Watch for

- An ICP of “any business that needs IT support”
- No clear differentiator
- No time to manage an SDR
- No qualification framework
- Unreliable CRM data
- Unknown conversion rates
- No capacity for new customers

Your readiness score

_____ out of 10

_____

8-10 Ready to recruit
You have the foundations for a dedicated sales development function.

5-7 Nearly ready
Close your gaps before you expect consistent SDR performance.

0-4 Build the foundations first
Your ICP, sales strategy, qualification and management come before hiring.

Your band appears in Adobe Acrobat and Reader once all 10 are answered. A practical self-assessment, not a formal industry standard.

Back to Part 2

4. How much does an offshore SDR cost?

Compare the fully loaded cost of the role, not offshore salary against onshore salary.

Illustrative cost comparison (AUD)	Onshore SDR	Offshore SDR
Base employment or staffing cost a year	$85,000	$36,000
Employment on-costs and benefits not included above	$15,000	Included in example fee
Sales software and data	$6,000	$6,000
Allocated management and training	$12,000	$12,000
Estimated annual total	**$118,000**	**$54,000**

An illustrative Australian-dollar scenario, not a quotation or a claim about current Australian or Sri Lankan market pricing. Actual pay, fees, taxes and inclusions will vary.

Onshore costs to count

Salary, superannuation or other employer contributions, payroll tax, commission, recruitment, equipment, software, training, management and overhead.

Offshore costs to count

The monthly staffing fee, plus technology and calling, data, onboarding, your own sales management, any incentives, and compliance and security.

$64,000 **less a year in this example.** But savings alone don't prove value: what matters is whether the SDR creates qualified opportunities and profitable revenue.

Part 3

The economics

At the end of this part you will be able to compare the fully loaded cost of an onshore and an offshore SDR, and work out the return.

In this part

4 What an offshore SDR costs 8

5 How to calculate the ROI 9

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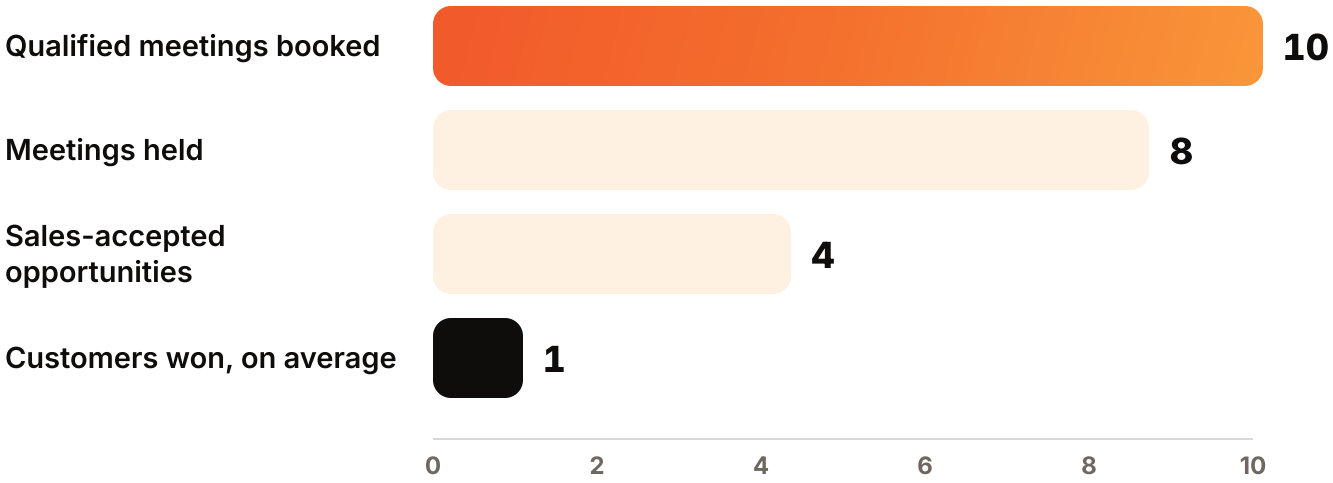
5. How to calculate offshore SDR ROI

An SDR isn't there to book meetings. It's there to create opportunities that become profitable managed services customers.

A hypothetical SDR month



$3,000 of new monthly recurring revenue (MRR). That is $36,000 a year if the customer stays 12 months at the same MRR.

A cheap SDR booking unqualified meetings is expensive. The metric that matters is cost per profitable customer acquired.

Payback on gross profit

The same month, at a 50% gross margin

$3,000 MRR at a 50% gross margin	**$1,500**
All-in SDR cost a month, for one customer	**$4,500**
$4,500 ÷ $1,500 of gross profit a month	**3 months**

This is the SDR cost's share of payback, not your full customer acquisition cost (CAC). A complete figure adds attributable marketing, closing, management and commission costs.

Back to Part 3

6. What makes a great offshore SDR?

Look beyond sales experience. Your SDR needn't be technical, but must talk credibly with decision-makers.

1 Exceptional communication
Clear, confident and natural with your market. Listens and adapts instead of reading a script.

2 Commercial curiosity
Wants to understand how businesses run and what the prospect is dealing with.

3 Resilience
Stays motivated, professional and consistent through rejection.

4 Coachability
Accepts feedback, shows self-awareness and applies coaching.

5 Research capability
Finds the decision-maker and a relevant reason to make contact.

6 CRM and technology skills
At home in HubSpot, Salesforce, LinkedIn Sales Navigator and engagement tools.

7 Accountability
Organised, follows through, keeps accurate records and owns results.

Nice to have

Experience selling IT services, cybersecurity or software. **Don't reject a strong B2B seller who hasn't sold managed services:** those are easier to teach than rapport.

Part 4

Recruitment

At the end of this part you will have a job description, a six-stage assessment and a candidate scorecard that weights itself.

In this part

6 What makes a great SDR 10
7 The job description 11
8 Interview, assess and score 12-13

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7. The offshore SDR job description

Template: copy and adapt

Position	Reporting to	Location	Employment
Sales Development Representative, managed IT services	**Sales Manager or Business Development Manager**	**Offshore, working your target market's hours**	**Full-time, dedicated role**

Role purpose. The SDR identifies and qualifies potential customers for our managed IT services business through prospect research, compliant outreach, early-stage discovery and qualified meeting generation, working with sales and marketing to build a consistent pipeline that matches our ICP.

Key responsibilities

- Research prospects that match our ICP
- Identify decision-makers and stakeholders
- Prospect through approved channels
- Hold relevant business conversations
- Identify technology challenges and needs
- Qualify prospects against agreed criteria
- Book qualified meetings for our sales team
- Keep accurate CRM records
- Manage prospect follow-up
- Feed back on messaging, objections and trends
- Achieve agreed activity, quality and pipeline KPIs
- Take part in coaching and reviews

Required experience and skills

- B2B sales, prospecting or lead generation
- Strong spoken and written English
- Confidence with business decision-makers
- Excellent listening and questioning
- Strong organisation and time management
- Experience using a CRM
- Works independently and in a distributed team
- Willing to learn IT services and cybersecurity
- Committed to ethical, compliant selling

Desirable

- Managed services or IT industry exposure
- Selling into Australia, New Zealand or the UK
- HubSpot or Salesforce
- LinkedIn Sales Navigator
- Apollo or a similar research platform
- Booking qualified B2B sales meetings

Success measures: qualified meetings booked and held, sales-accepted opportunities, qualified pipeline contribution, conversion rates, CRM data accuracy, and following agreed prospecting and compliance processes.

The objective: consistent, high-quality opportunities that contribute to profitable MSP growth.

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8. How to interview and assess candidates

A traditional interview isn't enough. Run six stages, with the same questions and conditions for every candidate.

1 Initial screening

Check experience, communication, pay expectations, availability and familiarity with your target market.

2 Communication

"Explain managed IT services to a business owner without a technical background."

Look for clarity, confidence and business value.

3 Prospect research

Give a hypothetical account. Ask about ICP fit, the decision-maker, likely challenges, a reason to call and the questions they would ask.

4 Cold calling role-play

Call the Managing Director of a 100-person accounting firm that uses another MSP and isn't looking. The goal: find a business issue worth exploring.

5 Objection handling

- "We're happy with our current IT provider."
- "Send me some information."
- "We don't have the budget."
- "I'm too busy."

Look for thoughtful answers, not defensive or pushy ones.

6 Coachability test

Give one specific piece of feedback after the role-play, then run it again. Did they apply it? **That can tell you more than years of experience.**

Back to Part 4

Candidate evaluation scorecard

Fill in on screen or print

Score each criterion from 1 to 5 for up to three candidates. The weighted total works itself out in Adobe Acrobat and Reader.

Assessment criterion	Weight	Candidate A	Candidate B	Candidate C
Spoken and written communication	25%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Discovery and listening ability	20%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Commercial curiosity and judgement	15%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Prospecting and sales experience	15%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Coachability	15%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
CRM, research and organisational skills	10%	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Weighted total Out of 5. Appears once all six are scored.	100%	_____ of 5	_____ of 5	_____ of 5

A strong candidate shows curiosity, confidence, professionalism and the ability to develop through feedback.

Score 1 for weak to 5 for excellent. Use the same questions and conditions for everyone.

Back to Part 4

9. Define your ICP before prospecting

Fill in on screen or print

A weak Ideal Customer Profile leads to poor targeting, generic conversations and low conversion.

Six dimensions, with an illustrative example

Industry	**Professional services**	Employee count	**50-200**
Geography	**Brisbane and South East Queensland**	Technology environment	**Microsoft 365 and Azure**
Business challenges	**Cybersecurity, IT scalability and operational efficiency**	Commercial fit	**Sufficient MRR and target gross margin potential**

Start with your existing customers: those with the strongest gross margins, good retention and efficient support. Then look for similar organisations.

Your ICP statement

Our ideal customers are _____ businesses with _____ employees operating in _____. They face challenges relating to _____ and value _____. Our MSP is particularly well positioned to serve them because _____. Our ideal engagement generates _____ MRR with an expected gross margin of _____.

Part 5

Building the sales engine

At the end of this part you will have an ICP statement, a tool stack and workflow, and a call framework with clear qualification criteria.

In this part

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10	Equip your SDR	15
11	A prospecting framework	16

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10. Equip your SDR with the right tools

Give your SDR the systems to research, engage and qualify. No tool stack replaces an effective sales process.

Recommended stack

Function	Example
CRM	**HubSpot or Salesforce**
Prospect research	**LinkedIn Sales Navigator**
Contact enrichment	**Apollo**
Website account intelligence	**Leadfeeder**
Business calling	**Approved VoIP or integrated calling**
Sales engagement	**HubSpot Sales Hub or equivalent**
Collaboration	**Microsoft Teams**
Performance reporting	**CRM dashboards or Power BI**

Recommended workflow

1. Identify companies that match your ICP
2. Research the relevant stakeholders
3. Review account history and buying signals
4. **Confirm outreach permissions and restrictions**
5. Prepare a relevant reason to engage
6. Prospect through approved channels
7. Qualify interest
8. **Book and hand over genuine opportunities**
9. Record everything relevant in the CRM
10. Measure performance and refine

Data security and access

Your SDR may handle prospect details, customer information and commercial data.

- ✓ Role-based access
- ✓ Multifactor authentication
- ✓ Company-managed accounts
- ✓ Clear rules for handling, keeping and deleting data
- ✓ Approved systems, never personal databases or unmanaged accounts
- ✓ Only the access the role needs

Back to Part 5

11. Give your SDR a repeatable prospecting framework

Don't make your SDR invent a daily process. Prepare every call, then use four steps in the conversation.

Before the call

Review the account, its context and past interactions. Find a reason to make contact.

1 Open

Say who you are and why you are calling.

2 Connect

Raise a relevant business challenge or observation.

3 Discover

Ask questions to understand the prospect's situation.

4 Propose

Agree an appropriate next step if they are interested.

Example opening (names are illustrative)

"Hi Sarah, it's James from ABC IT. We work with accounting firms across Brisbane, helping them strengthen cybersecurity and reduce IT disruption during critical reporting periods. I'm interested in how your organisation is approaching those challenges as the business grows. Is that something your team is currently focused on?"

The first call isn't for selling managed services. It's for finding a relevant challenge worth exploring.

A qualified meeting establishes

- ICP alignment
- A relevant business need
- An appropriate stakeholder
- Commercial potential
- A genuine reason to continue

Don't reward meetings with little real potential. **Quality matters more than quantity.**

Back to Part 5

12. The first 90 days: your onboarding plan

Even experienced salespeople need time to learn your market, offer and sales process. Plan a realistic ramp.

Days 1 to 30 **Foundation and training** Build knowledge, confidence and familiarity with your sales process.

Week 1
Understand the business

- ✓ Company and culture
- ✓ Managed IT services overview
- ✓ ICP and target market
- ✓ Value proposition and case studies
- ✓ Meet the sales team
- ✓ CRM and technology set-up
- ✓ Security and compliance training

Week 2
Learn the sales process

- ✓ Pipeline stages
- ✓ Qualification criteria
- ✓ Prospect research
- ✓ Cold calling frameworks
- ✓ Objection handling
- ✓ CRM expectations
- ✓ Listen to real discovery calls

Week 3
Practise and prepare

- ✓ Mock prospect conversations
- ✓ Account research exercises
- ✓ Script development
- ✓ Role-play and coaching
- ✓ Build the first target account list
- ✓ Test systems and workflows

Week 4
Begin live prospecting

- ✓ Launch controlled prospecting
- ✓ Review early calls
- ✓ Spot common objections
- ✓ Improve messaging
- ✓ Refine qualification
- ✓ Book the first meetings

2–4 **qualified meetings booked is an illustrative month 1 target.** Adjust for experience and lead volume.

Part 6

Onboarding and performance

At the end of this part you will have a 90-day onboarding plan, monthly KPI targets and a daily, weekly and monthly management rhythm.

In this part

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14	Manage your SDR	20

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Days 31 to 90: from consistency to productivity

The second and third months turn training into a repeatable rhythm, then into full role expectations.

Days 31 to 60

Consistency and conversion

Establish a repeatable prospecting rhythm.

- Consistent outreach
- Better decision-maker engagement
- Stronger openings
- Effective discovery questions
- Stronger objection handling
- Better qualification
- Accurate CRM records
- Weekly coaching

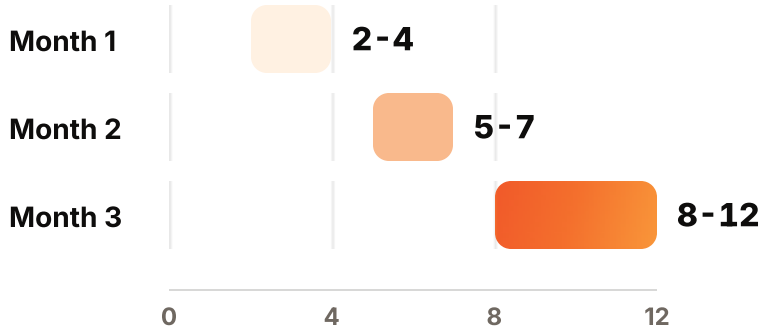
Days 61 to 90

Productivity and optimisation

Move towards full role expectations.

- Better conversion rates
- The target segments that work
- Stronger qualification
- Better meeting attendance
- Refined messaging
- A consistent follow-up pipeline
- More ownership and accountability

Illustrative qualified meetings booked a month



Proposed targets for an outbound-focused SDR, not verified MSP benchmarks. Specialist, high-value prospecting may justify fewer meetings.

Track these milestones every month.

Worksheet 2, page 27 ›

The first 90 days aren't only about a meeting target. They build the skills and processes behind long-term performance.

‹ Back to Part 6

13. The offshore SDR KPI scorecard

Fill in on screen or print

Measure activity, conversion and commercial outcomes. Write your own monthly targets in the last column.

Monthly KPI	Illustrative target	Your target
Prospecting call attempts	400-600	
Meaningful conversations	40-60	
● Qualified meetings booked	8-12	
Meeting attendance	80%+	
● Qualified meetings held	7-10	
● Meeting-to-opportunity conversion	40-60%	
Sales-accepted opportunities	3-6	
CRM data and process compliance	95%+	
● Pipeline MRR generated	Set by your MSP	
● SDR-sourced new MRR	Track actual	

● **The five metrics that matter most**

Planning assumptions for a fully ramped SDR targeting SMB and mid-market prospects, not verified MSP benchmarks.

Core conversion formulas

Conversation rate
Meaningful conversations ÷ call attempts × 100

Conversation-to-meeting rate
Meetings booked ÷ meaningful conversations × 100

Meeting attendance rate
Meetings held ÷ meetings booked × 100

Meeting-to-opportunity rate
Sales-accepted opportunities ÷ qualified meetings held × 100

Agree definitions. A meaningful conversation is a real discussion with a relevant stakeholder, not a quick exchange with a receptionist.

Don't reward meeting volume alone. Combine meeting quality, accepted opportunities and following the agreed process.

Back to Part 6

14. How to manage an offshore SDR successfully

Offshore doesn't mean unmanaged. Your SDR needs clarity, coaching, feedback, accountability and room to grow.

Daily

A brief check-in

- Priority accounts
- Meetings scheduled
- Prospecting activity
- Follow-up commitments
- Blockers that need support

Keep it focused and skip unnecessary admin.

Weekly

30-minute coaching

- KPI performance
- Quality of recent conversations
- Common objections
- Qualified opportunities generated
- Pipeline and follow-up
- One improvement priority for next week

Monthly

Performance review

Is your SDR improving? Look at conversion rates, pipeline quality, CRM accuracy and the wider sales process, not meeting volume alone.

Review real calls, where recording is lawful and disclosed

Professional opening | Relevance | Discovery questions | Listening | Objection handling | Qualification | Meeting transition | Professionalism

Include your SDR in sales meetings, training, product updates and celebrations. They should feel like part of your sales team, not a supplier working through a list of numbers.

Back to Part 6

15. Ten common offshore SDR hiring mistakes

Most have little to do with the SDR. Each comes with what to do instead.

1 Hiring on cost alone
Prioritise communication, judgement, coachability and meaningful conversations.

2 Expecting the SDR to write the strategy
They execute and contribute. You own the ICP, positioning and go-to-market.

3 Too little training
Give structured onboarding and ongoing education.

4 Generic scripts
Prospects hear plenty of IT pitches. Use relevant, industry-specific messaging.

5 Measuring only calls made
Track qualification, conversion and pipeline contribution.

6 No sales leadership
Assign an internal owner for the SDR's success.

7 Poor time-zone alignment
Plan hours around where prospects are and lawful calling times.

8 Ignoring compliance
Your MSP stays responsible for compliant outreach, even offshore.

9 Expecting immediate revenue
Watch leading indicators while each cohort of opportunities matures.

10 Treating offshore talent differently
Give the same respect, inclusion, clear goals and leadership.

Part 7

Overcoming the challenges

At the end of this part you will know the ten most common hiring mistakes and the controls to set up before the first call.

In this part

15 Ten hiring mistakes 21
16 Compliance and security 22

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16. Compliance, security and market readiness

Your SDR may handle prospect data, use your CRM and represent you in another market. That brings legal duties.

Australia

- Check the Do Not Call Register, telemarketing standards and the Spam Act.
- Call at permitted times and meet identification and termination requirements.
- Commercial emails and messages generally need consent, sender identification and an unsubscribe.

Guidance: **Australian Communications and Media Authority**, acma.gov.au

United Kingdom

- The Privacy and Electronic Communications Regulations (PECR) and UK GDPR apply.
- Screen live business marketing calls against the Telephone and Corporate Telephone Preference Services, subject to exceptions.
- Process contact data on a suitable lawful basis and respect objections to direct marketing.

Guidance: **Information Commissioner's Office**, ico.org.uk

Offshore data handling

- Role-based CRM access
- Multifactor authentication
- Data processing agreements
- International transfer safeguards
- Approved calling and recording platforms
- Secure equipment and networks
- Access removal and offboarding controls
- Staff training and monitoring

Write a prospecting policy

Permitted channels, calling times, consent and suppression, data retention, call recording and how complaints are escalated.

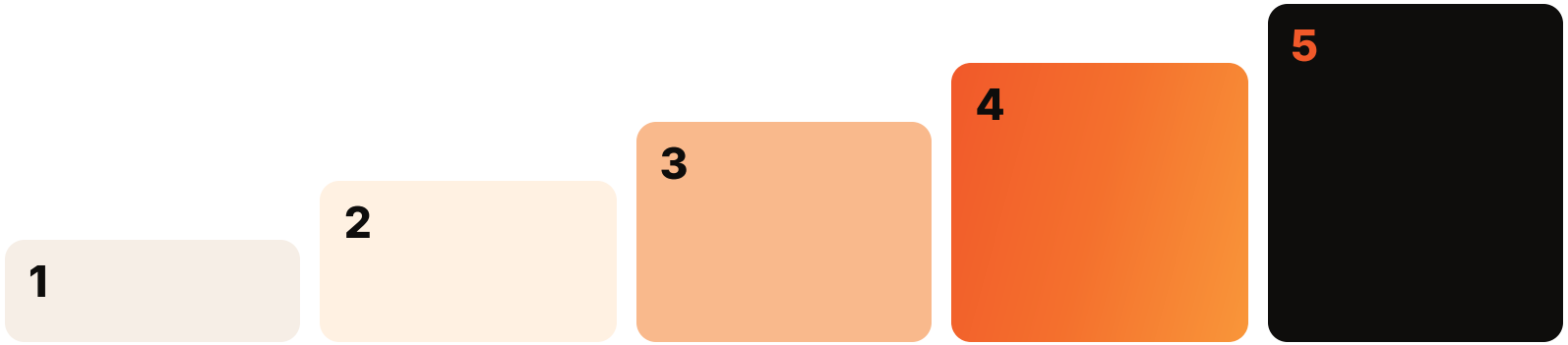
Rules vary by country, business type and channel, so get legal review before new international outreach. General information, not legal advice.

Back to Part 7

17. From one SDR to a predictable sales engine

Fill in on screen or print

Your first SDR is only the beginning. The goal is a sales development capability that scales.



1 Founder-led sales
The founder prospects, qualifies, runs discovery and closes. Growth depends on the founder's capacity.

2 Dedicated SDR support
An SDR owns research, early engagement and qualification. The founder or BDM converts.

3 Structured sales development
Consistent processes, defined KPIs, CRM workflows and coaching make the pipeline measurable.

4 Specialised sales functions
Inbound SDRs, outbound BDRs, BDMs, Account Executives, and customer success and account management.

5 Predictable revenue operations
Sales, marketing, finance and customer success share one set of reporting.

Where is your MSP today? ○ Stage 1 ○ Stage 2 ○ Stage 3 ○ Stage 4 ○ Stage 5

At stage 5 you know your lead generation effectiveness, conversion rates, acquisition cost, pipeline coverage, average customer MRR, new customer gross margin, retention and net recurring revenue growth.

Part 8

Scaling your sales function

At the end of this part you will know the five stages from founder-led sales to predictable revenue operations, and where your MSP is today.

In this part

17 From one SDR to a sales engine 23

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The offshore SDR hiring checklist

Fill in on screen or print

Tick each step as you complete it. Your progress adds up on the next page.

Strategy and readiness ☐ of 6

- ☐ Define the SDR's main responsibilities
- ☐ Confirm whether the role is inbound, outbound or hybrid
- ☐ Define the ICP
- ☐ Set the target market and geography
- ☐ Agree commercial success measures
- ☐ Assign a sales leader to manage the role

Commercial planning ☐ of 6

- ☐ Calculate the fully loaded cost
- ☐ Set expected meeting and opportunity targets
- ☐ Estimate average customer MRR
- ☐ Understand historical conversion rates
- ☐ Build a realistic ROI model
- ☐ Set an initial ramp-up budget

Recruitment ☐ of 8

- ☐ Finalise the job description
- ☐ Define mandatory skills and experience
- ☐ Screen communication ability
- ☐ Run a prospect research exercise
- ☐ Run a cold calling role-play
- ☐ Assess objection handling
- ☐ Test coachability
- ☐ Complete background and reference checks

Part 9

Your hiring action plan

At the end of this part you will have a completed hiring checklist, a business case, a 90-day success plan and a weekly review.

In this part

- The hiring checklist 24-25
- Worksheet 1: Business case 26
- Worksheet 2: 90-day success plan 27
- Worksheet 3: Weekly review 28

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The hiring checklist: onboarding and management

Fill in on screen or print

Finish the set-up, then keep the management steps running once your SDR has started.

Onboarding

of 8

- [ ] Provide company and industry training
- [ ] Train the SDR on your ICP and value proposition
- [ ] Configure approved systems
- [ ] Complete security and compliance training
- [ ] Introduce prospecting scripts
- [ ] Explain qualification requirements
- [ ] Set CRM expectations
- [ ] Set 30, 60 and 90-day milestones

Management

of 8

- [ ] Set daily priorities
- [ ] Hold regular coaching sessions
- [ ] Review call and conversation quality
- [ ] Track qualified meetings
- [ ] Monitor opportunity conversion
- [ ] Measure pipeline contribution
- [ ] Review commercial results
- [ ] Recognise and develop performance

Your progress

of 36 steps done

Strategy and readiness	of 6
Commercial planning	of 6
Recruitment	of 8
Onboarding	of 8
Management	of 8

Adobe Acrobat and Reader count your ticks.

Next: your business case ›

‹ Back to Part 9

Your offshore SDR business case

Worksheet 1: fill in on screen or print

Enter your own figures. In Adobe Acrobat and Reader, the cost and return lines work themselves out as you type.

Your assumptions			Example
Current monthly cost of sales development	$		
Proposed monthly offshore SDR cost	$		$3,000
Monthly software and management cost	$		$1,500
Total proposed monthly SDR investment	$		$4,500
Difference from your current monthly cost			
Target qualified meetings held a month			8
Expected meeting-to-opportunity conversion		%	50%
Expected opportunity win rate		%	25%
Average new customer MRR	$		$3,000
Expected gross margin		%	50%

Expected commercial performance			Example
Qualified opportunities a month Meetings held × meeting-to-opportunity rate			4
Expected customers won a month Qualified opportunities × win rate			1
Expected new MRR a month Customers won × average customer MRR	$		$3,000
Monthly recurring gross profit added Expected new MRR × gross margin	$		$1,500
Allocated SDR cost per new customer Monthly SDR investment ÷ customers won	$		$4,500
SDR cost payback, in months Cost per new customer ÷ gross profit per customer			3

Use full acquisition costs, including closing and marketing, to judge your real CAC and payback.

A simplified steady-state model. It leaves out the time between meetings, wins and recurring revenue starting.

The example column repeats the illustrative figures from chapters 4 and 5.

Back to Part 9

Your 90-day SDR success plan

Worksheet 2: fill in on screen or print

Agree the expected level for each objective, tick it when your SDR reaches it and review the plan at day 90.

Objective	Days 1 to 30	Days 31 to 60	Days 61 to 90
Company and market knowledge	☐ Foundation	☐ Developing	☐ Established
Prospect research	☐ Supervised	☐ Consistent	☐ Independent
Calling and discovery	☐ Training	☐ Improving	☐ Competent
Qualification	☐ Initial	☐ Developing	☐ Consistent
CRM management	☐ Training	☐ Consistent	☐ Independent
Meetings booked	☐ 2-4	☐ 5-7	☐ 8-12
Coaching	☐ Frequent	☐ Weekly	☐ Weekly
Performance review	☐ Initial	☐ Progress	☐ Full review
Reached	☐ of 8	☐ of 8	☐ of 8

SDR name

Sales manager

Start date

90-day review date

Primary improvement objectives

1.

2.

3.

Check progress every week with the performance review.

Worksheet 3, page 28 ›

‹ Back to Part 9

Weekly SDR performance review

Worksheet 3: fill in on screen or print

Run it every week. In Adobe Acrobat and Reader, the percentages and conversion rates work themselves out.

Week commencing	Owner	Review date

Metric	Target	Actual	Of target	Conversion
Call attempts			%	
Meaningful conversations			%	%
Qualified meetings booked			%	%
Qualified meetings held			%	%
Opportunities created			%	%
Pipeline MRR generated ($)			%	

Conversion compares each row with the one above. If it drops:

Few conversations: check contact data, calling times and targeting.

Few meetings: sharpen the message and value proposition.

Few opportunities: tighten qualification.

What worked well this week?

What were the biggest challenges?

What did we learn about our target market?

What improvement will we make next week?

Back to Part 9

Don’t just hire an SDR. Build a sales engine.

The value doesn’t come from employing someone overseas. It comes from a sales development function that consistently creates qualified opportunities, and that takes five things.

1

The right target market

Clearly define which businesses you want to win.

Chapter 9 ›

2

The right person

Communication, curiosity, resilience and coachability.

Chapter 6 ›

3

The right process

Repeatable prospecting, qualification and handover.

Chapter 11 ›

4

The right leadership

Consistent coaching, feedback and accountability.

Chapter 14 ›

5

The right commercial focus

Measure qualified pipeline, acquisition cost and profitable recurring revenue.

Chapter 5 ›

Success isn’t about reducing the cost of your sales team. It’s about a sales engine that consistently acquires the right customers, at the right cost, with the right margins.

‹ Back to the guide on one page

Build your offshore sales development team

We help MSPs build dedicated offshore teams, including SDRs and BDRs who work as an extension of your business.

How Dijital Team can help

Dedicated SDRs and BDRs	Your SDR works only with your business, using your systems, processes and sales strategy.	The SDR role ›
Predictable monthly costs	A fixed monthly fee helps you plan and manage your sales development investment.	
Recruited for your market	Sri Lankan professionals, assessed for capability, communication and fit with your target market.	
Better Business Pathway	Stronger margins, sustainable growth and predictable performance for MSP leaders.	About the pathway ›



Your next steps

- [ ] Readiness scored
- [ ] Business case built
- [ ] Job description finalised
- [ ] Conversation booked

Ready to hire your first offshore SDR? Book an MSP performance conversation with Dijital Team. **Book a conversation**

General business information. Salary, cost, KPI and financial figures are illustrative: check them against your business and market, and get legal advice on employment, privacy and direct marketing.