dijital team

The MSP Cold Calling Playbook

Scripts, Objection Handling & SDR Scorecard

Turn cold calls into conversations, conversations into opportunities and opportunities into profitable growth.



10	10	15	30
call scripts	discovery questions	objections handled	day plan

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The playbook on one page

For MSP owners, sales managers, SDRs and BDRs. Select a section to go straight to it.

	1 Prepare Pages 3 to 7	2 Call Pages 8 to 15	3 Objections and meetings Pages 16 to 22	4 Measure and improve Pages 23 to 29
What you do	Learn the five rules, define your ideal customer and plan every call.	Adapt ten scripts, tailor your opening and ask better questions.	Answer 15 objections and book meetings worth having.	Score the month and the calls, coach weekly and run a 30-day plan.
What you'll have	✓ An ideal customer profile ✓ Three value propositions ✓ A research checklist ✓ A daily desk checklist	✓ Ten call scripts ✓ Your industry opening ✓ Ten discovery questions	✓ 15 objection responses ✓ Your improved responses ✓ A qualified meeting checklist ✓ A handover template	✓ A monthly SDR scorecard ✓ Targets from your revenue goal ✓ A call quality score out of 50 ✓ A 30-day plan
Start here	Page 3 ›	Page 8 ›	Page 16 ›	Page 23 ›

Type into any worksheet on screen, or print it. In Adobe Acrobat and Reader, the scorecards and targets work themselves out.

Need someone to make these calls? Dijital Team provides dedicated offshore SDRs and BDRs for MSPs. **Book a conversation**

1. Prepare:
Know who you're calling, and why

At the end of this section you will have an ideal customer profile, three value propositions, a research checklist, a four-step call structure and a daily desk checklist.

The most important part of cold calling happens before the first call.

In this section

1 The five rules
Page 4

2 Your ideal customer profile
Page 5

3 Research, then four steps
Page 6

4 Desk checklist and calling rules
Page 7

Back to the playbook on one page

Cold calling isn't dead. Bad cold calling is.

Before anyone picks up the phone, your whole sales team should work to these five rules.

The call most prospects get

"Hi, it's John from ABC IT. We're a managed IT services provider offering proactive support, cloud solutions and cybersecurity. Are you happy with your current IT provider?"

Sound familiar? The problem isn't the phone. It's calling the wrong businesses, with the wrong message and no reason for the prospect to engage.

The goal isn't more calls. It's more conversations with the right businesses.

The five rules of effective MSP cold calling

1 **Relevance beats volume.**
A focused campaign to well-matched businesses beats a hundred calls to poor fits. Start from a defined ICP, not a purchased list.

2 **Sell the business outcome, not the technology.**
Owners think about growth, productivity, risk, costs and profitability, not RMM tools or patch management.

3 **Your first call isn't about closing.**
Establish relevance, find a possible business challenge and decide whether a deeper conversation makes sense.

4 **Ask questions and listen.**
Be curious about the prospect's business, not focused on finishing a script.

5 **Measure opportunities, not just activity.**
Calls and meetings are indicators. The real value is qualified opportunities and profitable recurring revenue.

Back to Prepare

Define your ideal customer profile

Worksheet: fill in on screen or print

"Businesses with 20-200 users" is a size range, not a strategy. Define exactly who you want to engage, and why.

Characteristic	Your ideal customer
Target industries	
Geographic markets	
Minimum employee count	
Maximum employee count	
Ideal number of supported users	
Typical technology environment	
Primary business challenges	
Target monthly recurring revenue	
Target gross margin	
Typical decision-makers	
Key buying signals	
Reasons a prospect would be a poor fit	

Your three strongest value propositions

We help **[type of business]** achieve **[business outcome]** by **[what makes us different]**.

1.

2.

3.

Specific "We help growing accounting firms reduce technology disruption, strengthen cybersecurity and improve productivity through standardised, proactive IT management."

Generic "We provide managed IT support and cybersecurity solutions." This could describe almost every MSP.

Back to Prepare

Research for 60 seconds, then follow four steps

Worksheet: fill in on screen or print

Successful cold calling doesn't need a complicated script. Check the account, then structure the conversation.

Before every call: 60 seconds

- [ ] Does this company match our ICP?
- [ ] Do I understand what the business does?
- [ ] Have I identified the right decision-maker?
- [ ] Can I identify a relevant business issue or trigger?
- [ ] Do I know why our MSP might be valuable to them?
- [ ] Have I checked previous CRM interactions?
- [ ] Have I confirmed this call is permitted and the contact hasn't opted out?

You don't need to know everything about a prospect, just enough to make the conversation relevant.

The four-step conversation model	Example conversation
1 Open Who you are and why you're calling. Short and conversational.	"Hi Sarah, it's James from ABC IT."
2 Connect A business problem, opportunity or observation that gives them a reason to engage.	"We work with accounting firms across Brisbane, helping them improve cybersecurity and reduce IT disruption during peak reporting periods."
3 Discover A question to test relevance. Listen to the answer, then explore.	"I'm interested in how your firm is approaching those challenges as you grow. Is that something you're currently focused on?"
4 Propose If there's a genuine opportunity, a next step: a discovery meeting, a later call or a resource they asked for.	"It sounds like there may be a couple of areas worth exploring. Would a 20-minute conversation with our solutions team be useful?"

Back to Prepare

Your daily desk checklist

Worksheet: fill in on screen or print

A successful day isn't a day with lots of calls. It's a day that moves the right opportunities forward.

Before you start calling

- [ ] Review today's priority accounts.
- [ ] Check previous conversations and promised follow-ups.
- [ ] Confirm calling permissions and restrictions.
- [ ] Find relevant company information and buying signals.
- [ ] Prepare industry-specific openings.
- [ ] Confirm availability for discovery meetings.

During your calling sessions

- [ ] Focus on the right accounts.
- [ ] Lead with a relevant business outcome.
- [ ] Ask questions before pitching.
- [ ] Listen and qualify.
- [ ] Respect objections and contact preferences.
- [ ] Record meaningful information in the CRM.
- [ ] Agree on an appropriate next step.

At the end of the day

- [ ] Complete outstanding CRM updates.
- [ ] Confirm meetings and handovers.
- [ ] Review conversation and meeting conversion.
- [ ] Identify lessons from difficult calls.
- [ ] Prepare priority accounts for the next day.
- [ ] Record any suppression or compliance actions.

Calling compliance

Cold calling must comply with relevant privacy, direct marketing and telecommunications requirements.

Australia: telemarketing activity is subject to Do Not Call Register requirements and applicable telemarketing conduct standards, including identification, permitted calling times and ending calls when requested.

United Kingdom: live business-to-business marketing calls must comply with the Privacy and Electronic Communications Regulations (PECR), including relevant Telephone Preference Service (TPS) and Corporate Telephone Preference Service (CTPS) restrictions, as well as applicable UK GDPR requirements.

Your organisation should

- ✓ Establish legally appropriate grounds and procedures for outreach.
- ✓ Respect opt-outs and requests to stop calling.
- ✓ Follow permitted calling hours and caller ID requirements.
- ✓ Comply with applicable rules for recording calls.
- ✓ Screen numbers against applicable suppression registers.
- ✓ Identify the caller and business appropriately.
- ✓ Protect prospect data and restrict access appropriately.
- ✓ Review the rules for every country or jurisdiction you target.

Using an offshore SDR or external service provider doesn't remove your MSP's compliance responsibilities. This playbook is general operational guidance, not legal advice.

Back to Prepare

2. Call:
Open a conversation, not a pitch

At the end of this section you will have ten scripts to adapt, an opening for your target industry and ten discovery questions that uncover real opportunities.

Every script follows the four steps: open, connect, discover, propose. Use it as a guide, not word for word.

In this section

1 **Scripts 1 and 2**
General introduction, industry specialist

2 **Scripts 3 and 4**
Business growth trigger, cybersecurity

3 **Scripts 5 and 6**
Microsoft 365 productivity, internal IT team

4 **Scripts 7 and 8**
Operational efficiency, contract review

5 **Scripts 9 and 10**
Referral introduction, follow-up

6 **Industry opening angles**
Page 14

7 **Ten discovery questions**
Page 15

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Call scripts 1 and 2

1 The general MSP introduction

Best for: A well-matched prospect where you don't have a specific buying signal.

Opening

"Hi [Name], it's [Your name] from [MSP].

We work with growing businesses in [industry], helping them improve IT reliability, strengthen cybersecurity and reduce the disruption technology can create.

I'm calling because we're speaking with businesses like yours about how they're managing their technology as they grow. Is that something your team is currently reviewing?"

Follow-up question

"What's working well with your current IT arrangements, and is there anything you'd like to improve?"

Meeting transition

"Based on what you've shared, it might be worth a short conversation to compare how other businesses are approaching this. Would that be useful?"

2 The industry specialist

Best for: MSPs targeting specific industries.

Opening

"Hi [Name], it's [Your name] from [MSP].

We specialise in supporting [industry] businesses, particularly around [industry-specific challenge].

We've been having conversations with businesses about [relevant business outcome]. I was interested to understand how your organisation is approaching that."

Follow-up question

"Has that become more challenging as your business has grown?"

Meeting transition

"We've developed some practical approaches that may be relevant. Would you be interested in exploring those in a short conversation?"

✓ **Why this works:** industry relevance gives a stronger reason to engage than a generic description of managed IT services.

Back to Call

Call scripts 3 and 4

3 The business growth trigger

Best for: Organisations that have announced expansion, recruitment or acquisitions.

Opening

"Hi [Name], it's [Your name] from [MSP].

I noticed your business recently [announced an expansion, opened a new office or acquired another company].

We work with growing businesses on keeping technology secure, consistent and manageable as their operations expand. Has the recent growth created any new IT priorities for your team?"

Follow-up question

"How are you managing consistency across your systems and locations?"

Meeting transition

"If it's useful, we could share how we've helped similar businesses approach those challenges."

✕ **Important:** only reference genuine, verified business developments.

4 The cybersecurity conversation

Best for: Organisations where cybersecurity resilience is a relevant business concern.

Opening

"Hi [Name], it's [Your name] from [MSP].

We help [industry] businesses strengthen cybersecurity and reduce the operational risk associated with technology incidents.

I'm reaching out because we're speaking with business leaders about how they're assessing their security maturity. How confident are you in your current cybersecurity arrangements?"

Follow-up question

"When was the last time your organisation had an independent review of its security controls?"

Meeting transition

"Would a short discussion about the areas businesses typically review be worthwhile?"

✓ **Why this works:** the conversation focuses on business risk rather than immediately selling security products.

Back to Call

Call scripts 5 and 6

5 The Microsoft 365 productivity conversation

Best for: Microsoft-centric businesses.

Opening

"Hi [Name], it's [Your name] from [MSP].

We work with businesses using Microsoft 365 to improve productivity, strengthen security and get more value from the technology they're already paying for.

I'm curious whether improving how your team uses Microsoft 365 is something you're currently looking at."

Follow-up question

"Are there particular areas where your employees still rely on manual processes or workarounds?"

Meeting transition

"There may be opportunities to get more value from your existing investment. Would you be open to a short discussion?"

6 The internal IT team conversation

Best for: Mid-market organisations with internal IT resources.

Opening

"Hi [Name], it's [Your name] from [MSP].

We work with organisations that have internal IT teams but need additional capability around areas like cybersecurity, cloud infrastructure or specialist projects.

I'm interested in understanding how your internal team manages workload and whether you use external partners for particular requirements."

Follow-up question

"Are there areas where your team would benefit from additional capacity or specialist expertise?"

Meeting transition

"If there are gaps worth exploring, we could have a conversation about how a co-managed model might support your team."

Back to Call

Call scripts 7 and 8

7 The operational efficiency conversation

Best for: Businesses focused on cost control, productivity and process improvement.

Opening

"Hi [Name], it's [Your name] from [MSP].

We help businesses improve how technology supports their operations, particularly by reducing repetitive work and unnecessary IT complexity.

I'm interested in whether improving operational efficiency is a priority for your business this year."

Follow-up question

"Are there any processes or systems that regularly create unnecessary work for your team?"

Meeting transition

"We may be able to share some practical ideas. Would it be useful to explore them together?"

8 The contract review conversation

Best for: Prospects with a known or voluntarily disclosed IT contract review window.

Opening

"Hi [Name], it's [Your name] from [MSP].

We work with [industry] businesses on improving IT reliability and cybersecurity.

I'm reaching out to understand how your organisation typically reviews its managed IT arrangements. Do you have a regular review process for your IT services?"

Follow-up question

"What are the most important things you evaluate when reviewing your IT provider?"

Meeting transition

"Even if a change isn't on the agenda, would it be useful to understand what alternative approaches are available for your next review?"

✕ **Important:** never claim to know when a prospect's contract expires unless that has been established.

Back to Call

Call scripts 9 and 10

9 The referral introduction

Best for: Prospects where you have permission to reference a genuine mutual connection.

Opening

"Hi [Name], it's [Your name] from [MSP].

[Mutual contact] suggested we connect because your business may be reviewing [relevant technology issue].

We help businesses with [specific outcome]. I wanted to introduce myself and understand whether that area is currently a priority for you."

Follow-up question

"What's your current approach to managing that requirement?"

Meeting transition

"Would it make sense to arrange a short introduction with our team?"

✕ **Important:** never imply a referral or endorsement that hasn't genuinely occurred.

10 The previous conversation follow-up

Best for: Prospects who engaged before, where further contact is appropriate and permitted.

Opening

"Hi [Name], it's [Your name] from [MSP].

We spoke [time period] ago about [specific challenge or initiative]. At the time, you mentioned [previously discussed priority].

I wanted to see how things have progressed and whether that remains a focus."

Follow-up question

"Has anything changed in your technology priorities since we last spoke?"

Meeting transition

"If it's still relevant, would it make sense to reconnect and explore the next steps?"

Back to Call

Make your opening relevant to the industry

Worksheet: fill in on screen or print

Tailor your messaging to the industries you specialise in, then write the opening your team will test.

Industry	Potential business issue	Suggested opening question
Accounting	IT reliability during tax and reporting periods	**"How do you minimise IT disruption during your busiest periods?"**
Legal	Confidentiality and secure document access	**"How are you balancing secure document access with flexible working?"**
Healthcare	Clinical system availability and security	**"How do you manage IT reliability around your critical clinical applications?"**
Manufacturing	Production continuity	**"How dependent are your production operations on reliable IT and networking?"**
Construction	Multi-site connectivity and collaboration	**"How are you managing secure access to systems across offices and project sites?"**
Financial services	Cybersecurity and compliance	**"How are your technology and security requirements evolving?"**
Professional services	Productivity and growth	**"How well is your current technology supporting the way your business is growing?"**
Retail	Multi-location technology consistency	**"How do you maintain consistent technology across your locations?"**

Your industry-specific opening

Target industry

Primary business challenge

Business outcome our MSP delivers

Our opening question

Our follow-up question

Back to Call

Ten discovery questions that uncover real opportunities

Discovery shows whether the prospect has a relevant requirement and whether you could add value. Don't interrogate: choose one or two questions.

Understanding the current environment

1. "How are you currently managing IT support across your business?"
2. "What's working particularly well with your current IT arrangements?"
3. "If you could improve one aspect of your technology environment, what would it be?"

Understanding future priorities

7. "What technology initiatives are likely to be important over the next 12 months?"
8. "How are you planning for technology requirements as the business grows?"

Understanding business challenges

4. "As your business has grown, what technology challenges have become more difficult to manage?"
5. "Are there areas where IT issues are creating unnecessary work or disruption?"
6. "How confident are you that your current cybersecurity arrangements meet the needs of the business?"

Understanding commercial fit

9. "When you review your IT services, what matters most in deciding whether a provider is right for your business?"
10. "Who else is typically involved when your organisation makes technology investment decisions?"

The three-question discovery rule

On a first call, aim to understand:

1. **Current state.** How are things managed today?
2. **Desired state.** What would the prospect like to improve?
3. **Next step.** Is there enough value in continuing the discussion?

Establish those three things and you've made meaningful progress.

Back to Call

3. Objections and meetings:
Handle objections, then book meetings worth having

At the end of this section you will have responses to 15 common objections, your own improved responses, a qualified meeting checklist, a handover template and a clear record of every call outcome.

Objections aren't always requests for more information. Sometimes they're a polite way of ending an unwanted conversation. Learn to tell the difference.

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1 Objections 1 to 5 and the framework
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2 Objections 6 to 10
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3 Objections 11 to 15
Page 19

4 Practise your responses
Page 20

5 Book a qualified meeting
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6 Record the outcome and hand over
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Respond to objections 1 to 5

Objections aren't always requests for more information. Use the framework only where the prospect is willing to continue.

1 "We're happy with our current IT provider."

"That's good to hear. I'm not suggesting you need to change providers. Out of interest, how do you currently review whether your IT arrangements are keeping pace with your business requirements?"

Objective: Explore future requirements rather than challenging the existing relationship.

2 "We're not looking to change IT providers."

"Understood. Is your current focus on maintaining what you have, or are there any improvement projects you're considering?"

Objective: Find a relevant opportunity outside full provider replacement.

3 "Just send me some information."

"Of course. Is there a particular area that's most relevant, such as cybersecurity, IT reliability or improving productivity?"

Objective: Clarify what is useful, confirm the requested follow-up and use a legally permitted channel.

4 "We don't have the budget."

"That makes sense. Is it that technology investment isn't currently a priority, or that your budget has already been allocated?"

Objective: Learn whether this is a permanent commercial mismatch or a timing issue.

5 "We have our own IT team."

"Absolutely. We also work with businesses that have internal IT teams. Are there any areas where your team uses external specialists or needs additional capacity?"

Objective: Explore relevant co-managed IT opportunities.

The four-step objection framework

1. **Acknowledge** the response without arguing.
2. **Clarify** the concern, where appropriate.
3. **Add relevance** if it adds value.
4. **Agree on a next step** only if they are interested.

Back to Objections and meetings

Respond to objections 6 to 10

Fit, timing, interest and price. Find out which one you're hearing, and respect a clear no.

6 "We're too small for managed IT services."

"Understood. How are you currently managing IT support and security?"

Objective: Establish whether there's an appropriate service fit. If not, qualify out.

7 "We're locked into a contract."

"That makes sense. Do you normally start reviewing your arrangements before the contract comes up for renewal?"

Objective: Understand the buying cycle without pressuring the prospect.

8 "We're too busy."

"No problem. I appreciate I've called unexpectedly. Would you prefer I leave it there?"

Objective: Respect the prospect's time and preferences.

9 "We're not interested."

"Understood. Thanks for your time."

Objective: End professionally. Record any opt-out request.

10 "How much do your services cost?"

"Pricing depends on the number of users, technology environment and level of service required. To give you a useful indication, could I understand a little more about your current environment?"

Objective: Get enough context to discuss pricing meaningfully, without avoiding the question.

Know when to stop

Objection handling should improve understanding, not get around a refusal.

If a prospect says they don't want the call or further marketing contact, end the call and update the relevant records.

Back to Objections and meetings

Respond to objections 11 to 15

Experience, price, capability and timing. Learn the prospect's priorities without disrupting a relationship.

11 "We had a bad experience with an MSP."

"I'm sorry to hear that. What was the main issue with the previous arrangement?"

Objective: Understand the concern and whether your approach addresses it.

12 "Our current provider is cheaper."

"Price is certainly important. When you assess your IT provider, what other outcomes matter most to your business?"

Objective: Explore value and service requirements, not simply discounting.

13 "We handle everything internally."

"That makes sense. Are there any specialist areas where you occasionally need external support, or is your team fully equipped for everything you need?"

Objective: Find out whether there's a co-managed or specialist services opportunity.

14 "We've just changed IT providers."

"Understood. I hope the transition has gone well. What were the main improvements you wanted to achieve from the change?"

Objective: Learn the prospect's priorities without trying to disrupt a new relationship.

15 "Call me in six months."

"Happy to. Is there a particular initiative or contract review happening around that time?"

Objective: Understand the timing and record the requested follow-up appropriately.

Practise the objections you hear most

Write down the objections your SDRs hear most often, how they answer today and a better response, then practise it in coaching.

Practice worksheet, page 20 ›

‹ Back to Objections and meetings

Practise your responses

Worksheet: fill in on screen or print

List the objections your SDRs hear most, how they respond today and a better response. Rehearse the improved version until it sounds natural.

	Objection frequently heard	Current response	Improved response	Coaching notes
1				
2				
3				
4				
5				

Acknowledge the response without arguing. › **Clarify** the concern, where appropriate. › **Add relevance** if it adds value. › **Agree on a next step** only if they are interested.

Back to Objections and meetings

Sell the value of the conversation

Worksheet: fill in on screen or print

Don't sell the meeting. "Can I book 30 minutes in your diary?" gives the prospect no reason to agree.

The formula	Cybersecurity	Operational efficiency	Business growth
Business issue	"Based on what you've shared, it sounds like cybersecurity maturity is becoming more important as your business grows.	"You mentioned that your internal team spends a lot of time managing recurring IT issues.	"With your upcoming expansion,
+ **Relevant expertise**	We've helped similar organisations review their security priorities.	It may be worthwhile exploring how other businesses are reducing that workload.	it might be useful to explore how you can keep IT support consistent across the new locations.
+ **Useful next step**	Would a short conversation about the areas worth assessing be useful?"	Would a short discussion be useful?"	Would you be interested in discussing that with our team?"

The qualified meeting checklist: before counting a meeting as qualified, confirm

- [ ] The business matches our ICP or an approved exception.
- [ ] The right stakeholder has agreed to attend.
- [ ] The meeting has a confirmed date and time.
- [ ] The CRM has been updated.
- [ ] The prospect has a relevant potential requirement.
- [ ] The purpose of the meeting is understood.
- [ ] The BDM has the context they need.

Back to Objections and meetings

Record every outcome, hand over every meeting

Worksheet: fill in on screen or print

Cold calling is part of a structured outbound process. Aim for relevant engagement, not maximum contact frequency.

1. **Select the right accounts** — Use your ICP
2. **Research the decision-maker** — Know their priorities
3. **Prepare the reason for calling** — A verified issue or signal
4. **Make the call** — Follow the four steps
5. **Record the outcome** — Update the CRM at once
6. **Follow up appropriately** — Permission-aware

Step 5: call outcomes and CRM actions

Outcome	CRM action
No answer	Record the attempt; evaluate permitted follow-up
Gatekeeper conversation	Record relevant, appropriate information
Decision-maker conversation	Record needs, outcome and next action
Qualified meeting booked	Create the meeting and the handover
Interested, not ready	Record timing and permitted follow-up
Poor fit	Mark as disqualified, with the reason
No further contact requested	Suppress future marketing contact
Incorrect details	Correct or remove unreliable information

Step 6: share a resource only when it's requested and permitted, complete agreed follow-ups, then qualify, nurture or close the record.

Meeting handover template

Company	Contact and position
Industry	Number of users or employees
Current IT model	Primary business challenge
Potential opportunity	Relevant timing
Key stakeholders	Reason for meeting
Agreed next step	SDR
BDM	

Back to Objections and meetings

4. Measure and improve:
Coach the conversation, not just the numbers

At the end of this section you will have a monthly SDR scorecard, call targets worked back from your revenue goal, a call quality score out of 50, a weekly coaching rhythm and a 30-day improvement plan.

A good SDR can make hundreds of calls without creating a commercially valuable opportunity. Measure activity, conversion and commercial outcome.

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2 Work back from your revenue target
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3 Score real calls and coach one skill
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4 The 20-minute weekly review
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5 Your 30-day improvement plan
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6 Your cold calling action plan
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The monthly SDR scorecard

Worksheet: fill in on screen or print

Measure three levels every month: activity, conversion and commercial outcome. The peach boxes work themselves out.

#	KPI	Suggested starting target	Your target	Actual	Status
1	Prospecting call attempts	400-600			
2	Meaningful conversations	40-60			
3	Qualified meetings booked	8-12			
4	Meeting attendance rate	80%+	%	%	
5	Qualified meetings held	7-10			
6	Meeting-to-opportunity conversion	40-60%	%	%	
7	Sales-accepted opportunities	3-6			
8	CRM data and follow-up compliance	95%+	%	%	
9	Qualified pipeline MRR created	Set by your MSP	$	$	
10	SDR-sourced new MRR	Track actual	$	$	

SDR

Month

KPIs on target

Your conversion rates

Conversation rate
Meaningful conversations ÷ call attempts × 100 %

Conversation-to-meeting rate
Qualified meetings booked ÷ meaningful conversations × 100 %

Meeting attendance rate
Meetings held ÷ meetings booked × 100 %

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

Illustrative starting targets for a fully ramped outbound SDR serving SMB and mid-market accounts, not verified MSP industry benchmarks. Adjust them to your market, calling permissions, research needs, sales cycle and actual performance.

Back to Measure and improve

Work back from your revenue target

Worksheet: fill in on screen or print

Set call targets from your own sales economics, not arbitrary industry figures. Type in the white boxes.

Work back, step by step	Example	Yours
Monthly new MRR target	$3,000	$
Average new customer MRR	$3,000	$
New customers required	1	
Expected opportunity win rate	25%	%
Qualified opportunities required	4	
Expected meeting-to-opportunity rate	50%	%
Meetings held required	8	
Expected meeting attendance rate	80%	%
Meetings booked required	10	
Expected conversation-to-meeting rate	20%	%
Meaningful conversations required	50	
Expected call-to-conversation rate	10%	%
Call attempts required	500	

Hypothetical example: one won customer at $3,000 MRR is $36,000 of annualised recurring revenue. The win may land in a later month, depending on the sales cycle.

Acquisition economics

Opportunity win rate

Closed-won opportunities ÷ all closed opportunities × 100

Closed-won ÷ All closed = %

Average SDR-sourced customer MRR

New MRR from SDR-sourced customers ÷ SDR-sourced customers won

New MRR ($) ÷ Customers won = $

SDR cost per new customer

Total allocated SDR cost ÷ new customers acquired from SDR-sourced opportunities

SDR cost ($) ÷ New customers = $

Use consistent reporting periods and attribution rules. Sales cycles delay new customers, so cohort-based reporting gives more accurate acquisition economics.

Back to Measure and improve

Score real calls, then coach one skill

Worksheet: fill in on screen or print

Score each area: 1 Needs significant improvement | 2 Below expectations | 3 Meets expectations | 4 Strong | 5 Excellent

#	Assessment criterion	Score 1 to 5
1	Professional, clear opening	1 2 3 4 5
2	Relevant reason for calling	1 2 3 4 5
3	Understanding of the prospect's business	1 2 3 4 5
4	Effective discovery questions	1 2 3 4 5
5	Active listening	1 2 3 4 5
6	Ability to explain business value	1 2 3 4 5
7	Appropriate objection handling	1 2 3 4 5
8	Effective qualification	1 2 3 4 5
9	Clear, relevant next step	1 2 3 4 5
10	Professionalism and respect for preferences	1 2 3 4 5

Total _____ out of 50

Rating _____

45-50 Excellent | 38-44 Strong
30-37 Developing | Below 30 Coaching priority

Internal coaching guidelines, not standardised industry ratings. Escalate any material breach of calling restrictions, consent requirements or an express request to stop contact separately, whatever the quality score.

Weekly call coaching worksheet

SDR name _____ Coach _____

Date _____ Calls reviewed _____

What worked well?

What needs improvement?

One skill to focus on next week

Planned coaching activity

Target improvement

Back to Measure and improve

Run a 20-minute weekly SDR review

Worksheet: fill in on screen or print

Consistent leadership makes sales development work. Use the same four-part agenda every week.

1 Results	2 Quality	3 Pipeline	4 Improvement
0	5	10	15
Review calls, meaningful conversations, qualified meetings and opportunities.	**Review selected call recordings or call notes.**	**Review open opportunities and follow-up commitments.**	**Agree on the most important improvement for next week.**
Are activities and outcomes on track?	Which opening messages are working?	Which prospects are most likely to progress?	Identify one area to improve and assign an owner.
Which conversion rate has changed most?	What objections are we hearing?	Are meetings being handed over effectively?	Agree on the coaching or process change.
Are our meetings creating genuine sales opportunities?	Are our discovery questions effective?	Are CRM records accurate and complete?	Define how you will measure the improvement.

Weekly review record

Week commencing

Qualified meetings booked

Qualified meetings held

Sales opportunities generated

Most successful industry or campaign

Biggest performance challenge

One improvement for next week

Owner

Review date

Back to Measure and improve

Your 30-day cold calling improvement plan

Worksheet: fill in on screen or print

One focus a week. Tick each action off as it is done; by day 30 you have a repeatable process with clear accountability.

1 Week 1 — Get the targeting right

Make sure you're calling businesses that fit your MSP.

- [ ] Define or refine your ICP.
- [ ] Review current prospect lists.
- [ ] Remove unsuitable accounts.
- [ ] Identify your top two target industries.
- [ ] Develop two industry-specific opening scripts.
- [ ] Establish compliant contact data and suppression processes.
- [ ] Record baseline SDR performance.

Success measure: A validated target account list and an agreed qualification framework.

2 Week 2 — Improve the conversations

Create more meaningful prospect engagement.

- [ ] Train the SDR on business-outcome messaging.
- [ ] Practise the four-step conversation framework.
- [ ] Review five actual calls.
- [ ] Identify the three most common objections.
- [ ] Practise objection handling.
- [ ] Introduce a consistent CRM call disposition process.

Success measure: Better conversation quality and a consistent calling approach.

3 Week 3 — Improve meeting conversion

Turn more relevant conversations into qualified meetings.

- [ ] Review conversation-to-meeting conversion.
- [ ] Analyse why prospects decline meetings.
- [ ] Improve value-based meeting transitions.
- [ ] Introduce the qualified meeting checklist.
- [ ] Improve BDM handover notes.
- [ ] Review meeting attendance.

Success measure: Better meeting qualification and improved conversion.

4 Week 4 — Optimise and scale

Establish a repeatable performance process.

- [ ] Review the monthly SDR scorecard.
- [ ] Analyse performance by industry.
- [ ] Identify the strongest call opening.
- [ ] Review sales-accepted opportunities.
- [ ] Identify process and coaching improvements.
- [ ] Set next month's targets from your results.
- [ ] Establish a weekly coaching rhythm.

Success measure: A measurable SDR process with clear accountability and improvement priorities.

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Your MSP cold calling action plan

Worksheet: fill in on screen or print

Complete this page with your sales team, using what you wrote down in this playbook.

Our primary ICP

Our highest-priority industry

Our strongest business value proposition

Our preferred cold calling opening

Our three most common objections

1

2

3

Monthly qualified meeting target

Monthly sales-accepted opportunity target

Required pipeline contribution

$ MRR

Our greatest current SDR performance challenge

The three actions we will implement over the next 30 days

	Action	Owner	Due date
1			
2			
3			

Next sales performance review

Back to Measure and improve

Better conversations create better opportunities

Cold calling isn't about convincing every business it needs a new IT provider. It's about starting the right conversations.

Better targeting
Define the organisations you want to work with.

Better conversations
Business outcomes, not technical products.

Better qualification
Genuine opportunities over calendar activity.

Better management
Clear KPIs, consistent coaching, a repeatable process.

Better economics
Profitable acquisition, not growth at any cost.

How Dijital Team can help

Dedicated offshore SDRs and BDRs

A dedicated professional, not a shared call centre, at a predictable monthly cost, with capacity you can add as you grow. They work as an extension of your team, with your sales strategy, processes and leadership.

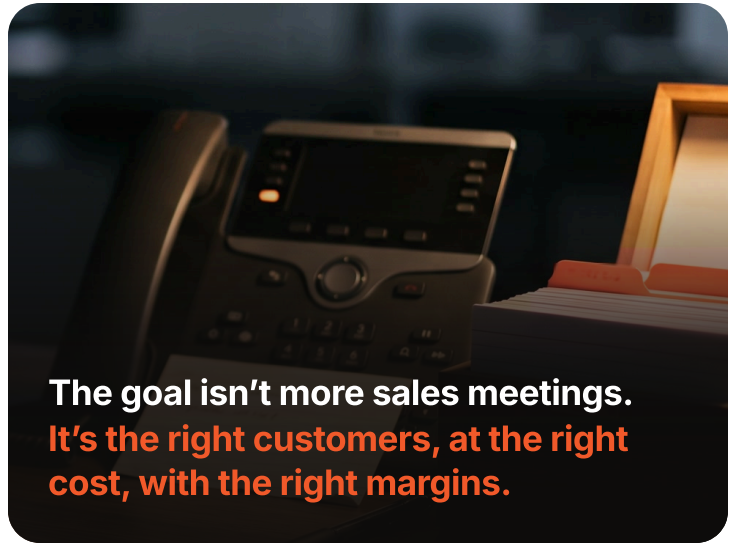
The SDR role ›

- ✓ Target account research
- ✓ Relevant, compliant engagement
- ✓ Sales appointment setting
- ✓ Sales development reporting
- ✓ CRM management and data quality
- ✓ Lead qualification and discovery
- ✓ Opportunity handover and follow-up

Better Business Pathway

Our focus on three outcomes for MSPs: stronger margins, sustainable growth and predictable performance.

About the pathway ›



Ready to build a more predictable sales pipeline? Let's talk about how a dedicated offshore SDR or BDR could help. **Book a conversation**

Targets, examples and ratings in this playbook are illustrative planning tools; results depend on your market, targeting, team, lead quality and execution. Adapt scripts to your business and applicable marketing laws.

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