dijital team

The MSP Outbound

Sales Engine Blueprint

From unpredictable referrals to predictable, profitable growth: a step-by-step playbook for building, managing and scaling your outbound sales function.



7 steps

6 worksheets

100 point account score

90 day checklist

dijitalteam.com

Stop hoping for growth. Start building a sales engine.

Ask most MSP owners where new customers come from and you'll hear the same answer: referrals and word of mouth.

The referral cycle

1. **Referrals arrive and the pipeline looks healthy**
2. **Everyone gets busy onboarding new customers**
3. **Prospecting slows and the pipeline empties**
4. **The founder steps in, and the cycle repeats**

You cannot build a predictable growth strategy around an unpredictable source of opportunities.

The answer isn't another salesperson. It's an outbound sales engine: a repeatable system that finds the right prospects, starts relevant conversations, qualifies genuine opportunities and builds a pipeline of profitable customers. It needs the right strategy, a clearly defined process, dedicated accountability and a consistent management rhythm, not a large team or an expensive technology stack.

Who it's for

- ✓ MSP owners and CEOs
- ✓ Sales Managers and BDMs building outbound
- ✓ MSPs hiring their first SDR or BDR
- ✓ MSPs improving prospecting consistency

How to use it

Complete the worksheets with your sales, marketing and leadership team, then review the results every month. In Adobe Acrobat and Reader, scores and rates add up by themselves.

Your details

Company	Completed by
Date	**Next review**

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The blueprint on one page

Seven steps, from your ideal customer to a 90-day launch. Start with the engine score on **page 4** ›, then pick a step.

	1 Define Pages 5 to 7	2 Prioritise Pages 8 to 10	3 Prospect Pages 11 to 13	4 Qualify Pages 14 to 16	5 Measure Pages 17 to 19	6 Manage Pages 20 to 21	7 Launch Pages 22 to 25
What you do	Profile the customers you should actively pursue.	Find matching accounts and score them out of 100.	Set a repeatable research and outreach routine.	Define a qualified meeting and a clean handover.	Track activity, conversion and commercial results.	Review daily, weekly, monthly and quarterly.	Work through the 90-day checklist.
What you'll have	✓ ICP profile ✓ Three outcomes ✓ Approved ICP statement	✓ Scoring model ✓ Scored accounts ✓ Tiered account plan	✓ Pre-call checklist ✓ Opening script ✓ Daily SDR checklist	✓ Pipeline stages ✓ Required CRM fields ✓ Handover template	✓ KPI scorecard ✓ Sales economics	✓ Review rhythm ✓ Weekly sales review	✓ 90-day checklist ✓ One-page sales plan
Your tool	Worksheet 1	Worksheet 2	Worksheet 3	Worksheet 4	Worksheet 5	Review template	Worksheet 6
Go to	Page 5 ›	Page 8 ›	Page 11 ›	Page 14 ›	Page 17 ›	Page 20 ›	Page 22 ›

Need someone to run the engine every day? Dijital Team provides dedicated offshore SDRs and BDRs for MSPs. **Book a conversation**

Start here: how predictable is your sales engine?

Fill in on screen or print

Score each statement with your leadership team: 0 Not in place 1 Partially in place 2 Consistently in place

#	Capability	Fix it in	Score
1	We have a clearly defined ICP.	Step 1 ›	0 1 2
2	We understand which customers are most profitable.	Step 1 ›	0 1 2
3	We have a differentiated value proposition.	Step 1 ›	0 1 2
4	We maintain a prioritised target account list.	Step 2 ›	0 1 2
5	We use consistent account qualification criteria.	Step 2 ›	0 1 2
6	We have a documented prospecting workflow.	Step 3 ›	0 1 2
7	We consistently record sales activity in our CRM.	Step 4 ›	0 1 2
8	We have a dedicated owner for prospecting.	Step 7 ›	0 1 2
9	We track qualified meetings and opportunities.	Step 5 ›	0 1 2
10	We measure pipeline value and conversion.	Step 5 ›	0 1 2
11	We provide regular sales coaching.	Step 6 ›	0 1 2
12	We understand our customer acquisition costs.	Step 5 ›	0 1 2
13	We evaluate new customer gross margins.	Step 5 ›	0 1 2
14	We review sales performance monthly.	Step 6 ›	0 1 2
15	We continuously improve our sales process.	Step 6 ›	0 1 2

Your score

out of 30

Your stage

0-10 Reactive
Growth relies on referrals or the founder. Priority: your ICP, a prospecting process and accountability.

11-20 Developing
Some process, inconsistent results. Priority: standardise execution, improve reporting, coach regularly.

21-30 Predictable
Defined, accountable and measured. Priority: conversion, acquisition economics and scale.

Your stage appears once all 15 statements have a score. Illustrative, not a validated benchmark.

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1. Define your Ideal Customer Profile

If everyone is your prospect, nobody is your customer.

"Businesses with 50-200 users" isn't an Ideal Customer Profile. It's a size range: it doesn't tell you which businesses value your services, what challenges they face or whether they'll be profitable to support.

Business A, 100 employees

A professional services firm with modern Microsoft 365, standardised technology, proactive leadership and a strong focus on cybersecurity.

Business B, 100 employees

A manufacturer with ageing infrastructure, unsupported applications, heavy customisation and management that sees IT as a cost.

Same size. Very different opportunities for your MSP.

Your ideal customer

- ✓ Has challenges you are particularly good at solving
- ✓ Values your expertise and approach
- ✓ Can be supported at your target gross margin
- ✓ Fits your technology and service delivery capabilities
- ✓ Has the right recurring revenue potential
- ✓ Is a sustainable long-term relationship

Step 1

Define your Ideal Customer Profile

At the end of this step you will have an ICP profile built from your best customers, three customer outcomes and an approved ICP statement.

In this step

1 Why company size is not a profile 5

Worksheet 1: the ICP builder 6

Your outcomes and ICP statement 7

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Your Ideal Customer Profile builder

Worksheet 1: fill in on screen or print

Complete each line to define the organisations your MSP should actively pursue.

	ICP characteristic	Your ideal customer
1	Primary target industry	
2	Secondary target industries	
3	Geographic markets	
4	Minimum number of employees or users	
5	Maximum number of employees or users	
6	Ideal number of business locations	
7	Preferred technology environment	
8	Key industry-specific applications	

	ICP characteristic	Your ideal customer
9	Primary cybersecurity requirements	
10	Typical business challenges	
11	Minimum acceptable MRR	
12	Target customer MRR	
13	Target customer gross margin	
14	Typical decision-makers	
15	Relevant buying signals	
16	Customer characteristics to avoid	

Start with your best customers

Identify your five to ten best customers, judged on:

- ✓ MRR
- ✓ Gross margin
- ✓ Cost to serve
- ✓ Standardisation
- ✓ Support needs
- ✓ Retention
- ✓ Relationship
- ✓ Growth potential

1 _____

2 _____

3 _____

4 _____

5 _____

Look for what they have in common. Your best future customers often share it.

Back to Step 1

Your outcomes and your ICP statement

Worksheet 1: fill in on screen or print

Don't simply describe what your MSP sells. Explain what your ideal customers achieve by working with you.

Your three core business outcomes

1. We help our customers _____ by _____
2. We help our customers _____ by _____
3. We help our customers _____ by _____

Example: a professional services MSP

Market	Accounting and professional services firms with 75-200 employees.
Challenges	Cybersecurity, operational reliability, collaboration and technology scalability.
Proposition	"We help growing professional services firms reduce IT disruption, strengthen cybersecurity and improve productivity through standardised technology and proactive IT management."

Your ICP statement

Our ideal customers are _____ businesses with _____ employees operating in _____. They typically use _____ and experience challenges relating to _____. They value _____ and are willing to invest in _____. Our ideal engagement generates _____ MRR at an expected gross margin of _____. We differentiate through _____.

Approved by _____ **Date** _____

Back to Step 1

2. Identify and prioritise your best prospects

A list of 5,000 random businesses isn't necessarily more valuable than 200 carefully selected organisations that fit your ICP.

Where to find target accounts

LinkedIn Sales Navigator
Companies and stakeholders by industry, location, size and job function.

Apollo
Research contacts, enrich account records and support engagement workflows.

HubSpot
Manage target accounts, record engagement and link prospecting to your pipeline.

Leadfeeder
Possible company-level website activity and buying signals to investigate.

Industry associations
Organisations in specific industries or professional sectors.

Your customer network
Similar businesses through referrals, partnerships and industry relationships.

Segment accounts into three tiers

Tier 1

Highest-fit, strategically valuable accounts
Deep research and highly personalised outreach

Tier 2

Strong-fit accounts with attractive potential
Industry-specific messaging and structured prospecting

Tier 3

Broader fit with lower immediate priority
Scalable, relevant engagement and nurturing

Spend the most research and personalisation time on Tier 1, where profitable recurring revenue is most likely.

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Step 2

Identify and prioritise your best prospects

At the end of this step you will have a consistent scoring model, scores for your first target accounts and a tiered account plan.

In this step

1 Where to look, and three tiers 8
Worksheet 2: the scoring model 9
Score accounts and plan the list 10

The 100-point target account scoring model

Worksheet 2: fill in on screen or print

Seven criteria that add up to 100, so your team stops chasing accounts just because they're large or seem interested.

1 Industry alignment — 20

20	Primary target industry
15	Strongly aligned secondary industry
10	Serviceable, not strategically targeted
5	Limited expertise or differentiation
0	Outside your intended market

2 Company size and MRR potential — 15

15	Ideal size and contract potential
10	Slightly outside your preferred range
5	Significant mismatch
0	Below your commercial minimum

3 Technology and service fit — 15

15	Strong fit with your preferred stack
10	Minor differences you can address
5	Remediation or specialist support
0	Outside your supported capabilities

4 Business challenges — 15

15	Clear challenges in your expertise
10	Relevant potential requirements
5	Limited demonstrated need
0	No identifiable relevance

5 Commercial potential — 20

20	Attractive MRR potential and expected gross margin
15	Viable, with manageable service costs
10	Possibly viable, needs further validation
5	Significant pricing or profitability concerns
0	Unacceptable commercial fit

6 Buying signals and timing — 10

10	Verified, relevant near-term buying signal
7	Credible future initiative or review
3	Limited evidence of active demand
0	No identified buying signal

7 Geographic alignment — 5

5	Within your preferred market
3	Within a secondary serviceable market
0	Outside your supported geography

Before you score

- ✓ Mark unknown information as unverified, never guessed.
- ✓ Review buying signals separately from long-term ICP fit: an ideal-fit account may deserve nurturing with no immediate need.
- ✓ Apply mandatory security, commercial and serviceability requirements whatever the score.

Back to Step 2

Score your target accounts

Worksheet 2: fill in on screen or print

Select one level per criterion for each account. In Adobe Acrobat and Reader, the total and tier work themselves out.

Criterion	Account 1	Account 2	Account 3
Company			
Industry and users			
Primary decision-maker			
1 Industry alignment out of 20	20 15 10 5 0	20 15 10 5 0	20 15 10 5 0
2 Company size and MRR potential out of 15	15 10 5 0	15 10 5 0	15 10 5 0
3 Technology and service fit out of 15	15 10 5 0	15 10 5 0	15 10 5 0
4 Business challenges out of 15	15 10 5 0	15 10 5 0	15 10 5 0
5 Commercial potential out of 20	20 15 10 5 0	20 15 10 5 0	20 15 10 5 0
6 Buying signals and timing out of 10	10 7 3 0	10 7 3 0	10 7 3 0
7 Geographic alignment out of 5	5 3 0	5 3 0	5 3 0
Total	/ 100	/ 100	/ 100
Tier			

Interpret the score

80-100	**Tier 1: Ideal target.** Prioritise for personalised outreach.
60-79	**Tier 2: Strong target.** Include in structured prospecting.
40-59	**Tier 3: Possible fit.** Research further or nurture.
0-39	**Low fit.** Generally deprioritise.

Illustrative thresholds: calibrate them with your actual customer results.

Your target account development plan

List size | Tier 1 | Tier 2 | Tier 3

Primary target industry

Target geographic market

Owner of account research | Completion date

Back to Step 2

3. Build a repeatable prospecting workflow

Prospecting fails when it depends on individual effort. Your SDR or BDR should know who to contact, what to say, which channels are permitted and what happens next.

The six-stage outbound prospecting workflow

1 Research
Find businesses that match your ICP, their stakeholders and buying signals.

2 Prioritise
Apply your account score: strong commercial fit, relevant challenges.

3 Prepare
Find a relevant reason for contact, tied to a business outcome, not your services.

4 Engage
Start a conversation through appropriate, compliant channels.

5 Qualify
Is there a relevant requirement, and is your MSP a suitable partner?

6 Progress or nurture
Book a discovery meeting, agree a follow-up or move the account to nurture.

The golden rule of outbound sales

Every interaction has a clear purpose, and every meaningful conversation ends with a clearly recorded next action.

Step 3

Build a repeatable prospecting workflow

At the end of this step you will have a pre-prospecting checklist, your opening script, a multi-channel plan and a daily SDR checklist.

In this step

1 The six-stage workflow 11
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Worksheet 3: channels and the day 13

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Before you call, and what to say

Worksheet 3: fill in on screen or print

Prepare every account the same way, then use the four-step framework to write your own opening.

A. Pre-prospecting checklist

Before any outbound activity, confirm:

- [ ] The account matches the ICP
- [ ] Account score and priority reviewed
- [ ] Relevant decision-makers identified
- [ ] CRM history reviewed
- [ ] A relevant business issue or buying signal identified
- [ ] Personalised value proposition prepared
- [ ] Contact information verified
- [ ] Calling and marketing restrictions confirmed
- [ ] The desired next step established

B. The four-step conversation framework (names are illustrative)

1 Open

Introduce yourself and say why you're calling.

"Hi Sarah, it's James from ABC IT."

2 Connect

Raise a relevant business challenge or observation.

"We work with accounting firms across Brisbane, helping them reduce IT disruption during busy reporting periods and strengthen cybersecurity."

3 Discover

Ask a question that helps you understand their situation.

"I'm interested in whether improving IT reliability or cybersecurity is something your organisation is focused on."

4 Propose

Where there's a genuine opportunity, suggest a next step.

"It sounds like there may be a couple of areas worth exploring. Would a short conversation with our solutions team be useful?"

Our preferred opening script

Target industry

Relevant business challenge

Our value proposition

Opening script

Primary discovery question

Follow-up question

Suggested meeting transition

Back to Step 3

Plan your channels and your SDR's day

Worksheet 3: fill in on screen or print

Decision-makers respond to different channels: calls, LinkedIn, relevant content, networking and email where permitted.

C. An example multi-channel prospecting workflow

1. **Research the organisation**
   Validate ICP fit
2. **Identify stakeholders**
   Understand the buying process
3. **Review buying signals**
   Establish relevance
4. **An appropriate introductory call**
   Begin a conversation
5. **Share a requested resource, where permitted**
   Provide value
6. **Follow up where agreed or otherwise lawful**
   Explore potential requirements
7. **Qualify and book a meeting**
   Create a sales opportunity
8. **Nurture, disqualify or close outreach**
   Maintain pipeline quality

Not a rigid sequence. Establish permissions, respect opt-outs and contact preferences, and comply with marketing and privacy laws.

D. Daily SDR operating checklist

Start of day

- [ ] Review priority target accounts
- [ ] Check scheduled meetings and follow-ups
- [ ] Confirm target market calling hours
- [ ] Review any new buying signals
- [ ] Prepare relevant outreach
- [ ] Check outstanding CRM tasks

During prospecting

- [ ] Focus on ICP-aligned accounts
- [ ] Use relevant, personalised messaging
- [ ] Ask questions before pitching
- [ ] Qualify genuine opportunities
- [ ] Record interactions accurately
- [ ] Respect contact preferences

End of day

- [ ] Update CRM records
- [ ] Confirm meetings and sales handovers
- [ ] Review activity and conversion
- [ ] Document common objections
- [ ] Prepare priority accounts for tomorrow

Back to Step 3

4. Turn conversations into opportunities

The objective isn't to fill your BDM's calendar. It's to create opportunities that could become profitable, long-term customers.

A qualified MSP sales meeting establishes five things

1. **Fit**
   Does the organisation match your ICP?
2. **Need**
   Is there a relevant challenge or opportunity?
3. **Stakeholders**
   Are the right people involved or identifiable?
4. **Commercial potential**
   Could it become a financially attractive customer?
5. **Timing**
   A credible reason to continue, now or later?

Some of your best future customers may be six or twelve months from reviewing their IT arrangements. **Nurture them rather than forcing them into the active pipeline.**

Sales qualification checklist

Worksheet 4

Before an opportunity goes to discovery, confirm:

- [ ] Matches our ICP, or has an approved exception
- [ ] An appropriate stakeholder is involved
- [ ] The meeting has a useful purpose
- [ ] The BDM has the information they need
- [ ] A relevant business challenge is identified
- [ ] There's credible commercial potential
- [ ] The prospect has agreed to the meeting
- [ ] CRM information is complete and accurate

Step 4

Turn conversations into opportunities

At the end of this step you will have a qualification checklist, defined pipeline stages, the CRM fields to require and an SDR-to-BDM handover template.

In this step

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CRM fields and handover 16

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Your MSP sales pipeline

Worksheet 4: fill in on screen or print

Start with a simple, clearly defined process rather than dozens of stages, and give each stage an owner.

	Stage	Definition	Required next action	Owner
1	**Target account**	Matches the ICP and is approved for prospecting	Identify stakeholders and research	
2	**Prospect engaged**	A relevant two-way interaction has occurred	Qualify interest and potential need	
3	**Qualified meeting**	Meets the qualification criteria and agrees to discovery	Confirm the appointment and handover	
4	**Sales opportunity**	Discovery confirms a credible potential engagement	Deeper discovery and solution development	
5	**Proposal**	A commercial solution has been presented	Agree next steps and the decision process	
6	**Negotiation or decision**	Commercial terms and approval are being finalised	Progress the decision and resolve open issues	
7	**Closed won**	The agreement has been accepted	Hand over to onboarding	
8	**Closed lost**	The opportunity is no longer progressing	Record the reason and update the CRM	
9	**Nurture**	A potential future fit without a current opportunity	Record timing and the permitted next contact	

Set up your CRM this way

Keep target accounts, early prospecting and nurture in your lead or account workflow where your CRM supports it, and create revenue-bearing deals only for credible opportunities. Closed lost is a closed deal outcome; nurture can be a lead status rather than a forecast stage.

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Required CRM fields and the meeting handover

Worksheet 4: fill in on screen or print

Make the same fields mandatory for every SDR, and complete a handover for every qualified meeting, so your BDM can build on the first conversation.

Required CRM fields: tick the ones you already require

Account

- [ ] Company name
- [ ] Industry
- [ ] Location
- [ ] Number of employees or users
- [ ] ICP score
- [ ] Account tier
- [ ] Website
- [ ] Technology environment, where known
- [ ] Account owner

Contact

- [ ] Contact name
- [ ] Job title
- [ ] Business contact details
- [ ] Role in the buying process
- [ ] Communication preferences
- [ ] Previous engagement history

Opportunity

- [ ] Lead source
- [ ] Business challenge identified
- [ ] Qualification status
- [ ] Potential MRR
- [ ] Estimated gross margin
- [ ] Expected close date
- [ ] Sales stage
- [ ] Opportunity owner
- [ ] Next action and date
- [ ] Reason for loss or disqualification

SDR-to-BDM meeting handover

Company

Primary contact

Position

Industry

Number of users

ICP score

Current IT arrangement

Business challenge identified

Commercial opportunity

Relevant buying timeline

Other stakeholders

Reason for meeting

Agreed next step

SDR or BDR

BDM

Back to Step 4

5. Measure what matters

Calls made, messages sent and meetings booked are important, but they aren't the ultimate measure of success. Track three categories.

1 Activity metrics
Are the agreed prospecting activities happening consistently?

2 Conversion metrics
Is that activity creating meaningful engagement and qualified opportunities?

3 Commercial metrics
Is the function creating pipeline and recurring revenue at an acceptable cost?

What a productive SDR month could look like (a hypothetical example)

500	10%	50	20%	10	80%	8	50%	4	25%	1
Call attempts		Meaningful conversations		Meetings booked		Meetings held		Opportunities created		Expected win

$3,000 of new MRR from each month's prospecting once the opportunities complete the sales cycle: **$36,000 a year** if the customer stays at the same MRR for 12 months.

Hypothetical results with an average new customer MRR of $3,000, not industry averages.

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Step 5

Measure what matters

At the end of this step you will have a monthly SDR and BDR scorecard with your own targets, and a model of your sales development economics.

In this step

1 Three categories, one example month 17
Worksheet 5: the KPI scorecard 18
Worksheet 5: your economics 19

Your monthly SDR and BDR scorecard

Worksheet 5: fill in on screen or print

Set your targets, enter the actual results each month, and in Adobe Acrobat and Reader the rates work themselves out.

KPI	Illustrative	Your target	Actual this month
Prospecting call attempts	400-600		
Meaningful prospect conversations	40-60		
Qualified meetings booked	8-12		
Meeting attendance rate	80%+		%
Qualified meetings held	7-10		
Meeting-to-opportunity conversion	40-60%		%
Sales-accepted opportunities	3-6		
CRM data and process compliance	95%+		%
Qualified pipeline MRR generated	Set by you		$
SDR-sourced new MRR	Track actual		$

Illustrative starting targets for a fully ramped outbound SDR targeting SMB and mid-market accounts, not verified MSP benchmarks. Tailor them to your ICP, channels, qualification standards and actual conversion results.

Your conversion rates this month

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 rate %
Sales-accepted opportunities ÷ qualified meetings held × 100

Opportunity win rate %
Closed-won ÷ all closed opportunities × 100

won of closed

Use consistent definitions, reporting periods and source attribution. Because of sales cycle delays, compare costs and revenue by acquisition cohort.

Back to Step 5

Your sales development economics

Worksheet 5: fill in on screen or print

Enter your own monthly figures. In Adobe Acrobat and Reader, the results and the payback period work themselves out as you type.

Your monthly figures			Example
Monthly SDR or BDR cost	$		
Monthly sales software and data cost	$		
Allocated sales management cost	$		
Total monthly sales development investment	$		$4,500
Target qualified meetings held			8
Target opportunity conversion rate		%	50%
Expected win rate		%	25%
Average customer MRR	$		$3,000
Expected customer gross margin		%	50%
Estimated full customer acquisition cost Per new customer, including closing, marketing and other acquisition costs	$		

Works itself out				Example
Expected opportunities created Meetings held × conversion rate				4
Expected new customers Opportunities × win rate				1
Expected new MRR generated New customers × average MRR	$			$3,000
Expected recurring gross profit New MRR × gross margin	$			$1,500
Allocated cost per new customer Total investment ÷ new customers	$			$4,500
Estimated CAC payback period Full CAC, or the allocated cost if blank, ÷ monthly gross profit per new customer			months	3

Why gross margin matters. At a 50% margin, $3,000 of MRR is $1,500 of recurring gross profit a month, so a $4,500 cost per customer is recovered in three months once billing begins, before other acquisition and onboarding costs. The objective isn't a cheaper sales team. It's a more profitable customer acquisition engine.

Back to Step 5

6. Set a sales management rhythm

Employing an SDR and configuring a CRM doesn't make a sales engine predictable. Leadership does: mature sales functions manage performance consistently.

Daily

Execution

Clear priorities and target accounts: research, outreach, qualification, follow-up and CRM updates.

A brief daily check-in removes blockers.

Weekly

Coaching and pipeline

A structured 20-30 minute review:

1. **Performance:** activity, conversations, meetings, opportunities
2. **Quality:** selected calls or notes, where review is lawful
3. **Pipeline:** opportunities that need action
4. **Challenges:** objections, targeting, conversion
5. **Improvement:** one or two changes for next week

Monthly

Performance and conversion

Review the full scorecard and the trends in:

- ✓ Meeting conversion
- ✓ Opportunity quality
- ✓ Pipeline value
- ✓ Sales handover effectiveness
- ✓ Cost per opportunity
- ✓ Revenue outcomes
- ✓ Results by industry and segment

Then refine your ICP, messaging and process.

Quarterly

Commercial effectiveness

Review the economics of customer acquisition:

- ✓ New MRR generated
- ✓ Pipeline coverage
- ✓ Customer acquisition cost
- ✓ CAC payback
- ✓ Average new contract value
- ✓ Expected gross margin
- ✓ Customer retention
- ✓ Results by channel

Step 6

Set a sales management rhythm

At the end of this step you will have a management rhythm from daily execution to quarterly reviews, and a weekly sales review your team can run.

In this step

1 Daily to quarterly 20

Your weekly sales review 21

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Your weekly sales review

Fill in on screen or print

Run the same 20-30 minute review every week. In Adobe Acrobat and Reader, the conversion rates work themselves out.

The agenda: 1 Performance | 2 Quality | 3 Pipeline | 4 Challenges | 5 Improvement

This week	Number	Conversion, works itself out
Calls completed		
Meaningful conversations		% Conversation rate
Meetings booked		% Conversation-to-meeting rate
Meetings held		% Meeting attendance rate
Opportunities created		% Meeting-to-opportunity rate
Pipeline MRR generated	$	

Week commencing

Most effective campaign or industry

Biggest issue identified

Improvement action

Owner

Due date

Each rate compares a row with the one above it, using the KPI formulas in Worksheet 5.

Back to Step 6

7. Launch your outbound sales engine

Worksheet 6: fill in on screen or print

30 Days 1 to 30
Build the foundations

Objective: Define your strategy, target market and sales operating model.

Strategy

- [ ] Review your existing customer profitability
- [ ] Define your Ideal Customer Profile
- [ ] Identify primary target industries
- [ ] Establish minimum commercial requirements
- [ ] Develop your differentiated value proposition
- [ ] Define your target MRR and margin requirements

Target accounts

- [ ] Build an initial list of 100-200 target accounts, or a list sized for your market
- [ ] Identify relevant stakeholders
- [ ] Apply the target account scoring model
- [ ] Categorise accounts into priority tiers
- [ ] Validate contact data and outreach permissions

Sales process

- [ ] Define qualification criteria
- [ ] Establish CRM pipeline stages
- [ ] Assign ownership of each stage
- [ ] Define meeting handover requirements
- [ ] Establish follow-up procedures
- [ ] Configure baseline reporting

People and management

- [ ] Assign responsibility for outbound sales development
- [ ] Define SDR or BDR responsibilities
- [ ] Agree initial performance expectations
- [ ] Establish weekly coaching meetings

Day 30 milestone: A clearly defined outbound sales strategy with an approved ICP, prioritised account list, prospecting workflow and CRM process.

Accountable leader _____ Target date _____ Done ____ of 21

Step 7

Launch your outbound sales engine

At the end of this step you will have a 90-day checklist with an accountable leader for each phase, and a one-page outbound sales plan.

In this step

Days 1 to 30 22
Days 31 to 60 23
Days 61 to 90 24
One-page sales plan 25

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The 90-day checklist: days 31 to 60

Worksheet 6: fill in on screen or print

The first 90 days aren't about immediate revenue. They establish the foundations, validate your approach and create a repeatable pipeline-building process.

60 Days 31 to 60 — Launch and validate

Objective: Begin prospecting, test messaging and measure early conversion.

Prospecting

- [ ] Launch controlled outbound activity
- [ ] Test industry-specific opening messages
- [ ] Conduct relevant prospect conversations
- [ ] Introduce a consistent qualification process
- [ ] Record every meaningful interaction in the CRM

Sales enablement

- [ ] Provide SDR or BDR coaching
- [ ] Review common objections
- [ ] Improve discovery questions
- [ ] Refine meeting booking approaches
- [ ] Strengthen the SDR-to-BDM handover

Measurement

- [ ] Track conversations and meetings
- [ ] Measure initial conversion rates
- [ ] Identify the best-performing target segments
- [ ] Review meeting attendance
- [ ] Assess opportunity quality

Day 60 milestone: An active outbound prospecting process with early evidence of engagement, conversion and opportunity generation.

Accountable leader _____ Target date _____ Done ☐ of 15

The 90-day checklist: days 61 to 90

Worksheet 6: fill in on screen or print

Tick each action off as it is done, and name the leader who answers for the phase.

90 Days 61 to 90 — Optimise and scale

Objective: Improve conversion, establish accountability and validate the commercial potential of the engine.

Optimisation

- [ ] Review account scoring accuracy
- [ ] Identify the strongest-performing industries
- [ ] Improve prospecting messages
- [ ] Refine qualification requirements
- [ ] Strengthen follow-up processes
- [ ] Address recurring sales objections

Performance

- [ ] Review SDR or BDR KPIs
- [ ] Compare targets with actual performance
- [ ] Assess pipeline MRR created
- [ ] Review sales cycle and opportunity progression
- [ ] Identify improvement priorities

Leadership

- [ ] Formalise weekly sales reviews
- [ ] Establish monthly reporting
- [ ] Define quarterly sales objectives
- [ ] Agree on performance ownership
- [ ] Decide whether more sales development capacity is justified

Day 90 milestone: A measurable outbound sales engine with a repeatable process, defined performance expectations and a clear continuous improvement plan.

Accountable leader _____ Target date _____ Done ____ of 16

Back to Step 7

Your one-page outbound sales plan

Fill in on screen or print

Complete this summary and use it as your leadership team's reference for the next 90 days.

Our market

Primary target industry

Ideal customer size

Target geography

Minimum customer MRR

Target gross margin

Our value proposition

We help

Achieve

By

Our sales development model

Outbound owner

Target account list size

Primary engagement channels

Monthly qualified meeting target

Monthly opportunity target

Monthly new MRR target

Our three priorities

	Priority	Owner	Due date	Success measure
1				
2				
3				

Next monthly review date

Leadership approval

Back to Step 7

Don’t just generate more leads. Build a better sales engine.

The goal isn’t more meetings, or revenue at any cost. It’s to consistently acquire the right customers, at the right cost, with the right margins.

How Dijital Team can help

Dedicated SDRs and BDRs	A team member focused on your business, working within your sales process, systems and management.	The SDR role ›
What they support	Account research, prospecting, CRM data, compliant outreach, qualification, meetings, follow-up and reporting.	
Predictable monthly costs	A simple fixed monthly fee helps you plan and manage your investment.	
Better Business Pathway	Stronger margins, sustainable growth and predictable performance.	About the pathway ›



Your next steps

- [ ] **Engine scored**
- [ ] **ICP approved**
- [ ] **Accounts scored**
- [ ] **Weekly review booked**

Ready to build your outbound sales engine? Book an MSP performance conversation with Dijital Team. **Book a conversation**

For education and business planning. KPI targets, scoring thresholds, conversion rates and financial examples are illustrative; results depend on your market, process and execution. Outbound prospecting must comply with privacy, telemarketing and electronic marketing laws.