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# SDR WORKFLOW OPTIMIZATION

according to the bucket system.



# BUCKET 1

## – UNCONTACTED

These are people you've never spoken with, including cold outbound and new inbound leads who have yet to be researched.

### PRIMARY BUCKET 1 ACTIVITIES

- Removing any accounts outside your swim lane.
- Attempting to contact leads via phone, email and social media.
- Performing additional research or preparation.



# BUCKET 1

## – UNCONTACTED

Each lead and every phone number should be attempted by a human and segmented into validated, not validated or bad.

Emails should be tested for deliverability and should not include any personalisation until you know a lead opens emails.

Social media engagement should only happen with leads who are active on social media.

Prioritizing validated phone numbers, only sending personalized emails to leads who've recently opened an email, and engaging on social media with leads who are actually active will save you time, labor costs and frustration.



# **BUCKET 2** – **WORKING**

These leads were researched, ran through the validation process in Bucket 1 and have at least one outbound call attempt.

A validated dial: when you can confirm the number associated with that person actually reaches them.

## **PRIMARY BUCKET 2 ACTIVITIES**

- Calling regularly to make contact.
- Documenting phone tree path on first attempt.
- Continuing with other outreach (email, social etc).



# BUCKET 3 – PRIORITY

These are prospects who meet any of the following criteria:

- You spoke with them but couldn't schedule a meeting.
- They engaged heavily with your email outreach, but never replied.
- They are in your swim lane and attended a webinar, event or recently engaged with any of your content.
- They're an inbound lead and are in your swim lane.
- They were once in your deal pipeline but failed to close over the last 6-9 months.

The only activity in this bucket is continuing with outreach via phone, email and social to schedule an appointment.



# **BUCKET 4** – SCHEDULED

This bucket consists of all upcoming appointments you've scheduled. These prospects are where the money comes from, so you have to watch this bucket like a hawk to ensure that they show up for the meeting.

## **PRIMARY BUCKET 4 ACTIVITIES**

- Confirming any appointments scheduled 1 or more weeks out, during the week the appointment is due.
- Confirming all appointments within 12-24 hours via email.
- Calling to confirm 2-3 hours before the scheduled time if the prospect didn't respond to final email confirmation.

If your prospects misses the appointment, they go back to Bucket 3 until the appointment is rescheduled.

