OUTSOURCED BDR
EVALUATION CHECKLIST

SmithDigital

1. Vendor Evaluation Criteria (Pre-Contract)

□ **Proven Industry or ICP Experience** - Executed campaigns in your industry and ICP.
□ **Onboarding & Training Process** - Provides a structured 2-3 week ramp-up plan for BDRs.
□ **SDR-to-Account Ratio** - Manages a load that supports personalization and follow-up.
□ **Reporting & KPI Transparency** - Delivers weekly reports tied to pipeline, not just activity.
□ **CRM & Tech Integration** - Integrates cleanly with your CRM and outbound tools.
□ **Cultural & Communication Fit** - Matches your tone, cadence, and collaboration style.
□ **Compliance & Data Security** - Meets GDPR, CCPA, and SOC 2 standards.

2. Key Questions to Ask Providers

□ How do you personalize outreach for our target personas?
□ What does your BDR ramp-up process look like?
□ Can you show sample dashboards or reports we'll receive?
□ What's your average meeting conversion rate by industry?
□ How do you align with our internal sales team and tools?

3. Integration Best Practices (Post-Contract)

□ **Sync KPIs and Dashboards:** Align on what counts as a qualified meeting and how it's tracked.
□ **Create Messaging & ICP Briefs:** Define your target customer, pain points, and outreach tone.
□ **Set CRM Access & Handoffs:** Document permissions and exactly when BDRs hand off leads.
□ **Run Weekly Syncs:** Use regular check-ins to review issues, refine messaging, and track KPIs.
□ **Embed in Your GTM Rhythm:** Treat outsourced BDRs like in-house reps—loop them into campaigns and updates.

4. Red Flags to Watch For

□ Emphasis on volume over lead quality
□ No defined onboarding process or training path
□ Incompatible tools or tech stack friction
□ Vague or inconsistent reporting
□ Hidden costs or unclear KPI alignment

Let's Build Your Pipeline Together

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