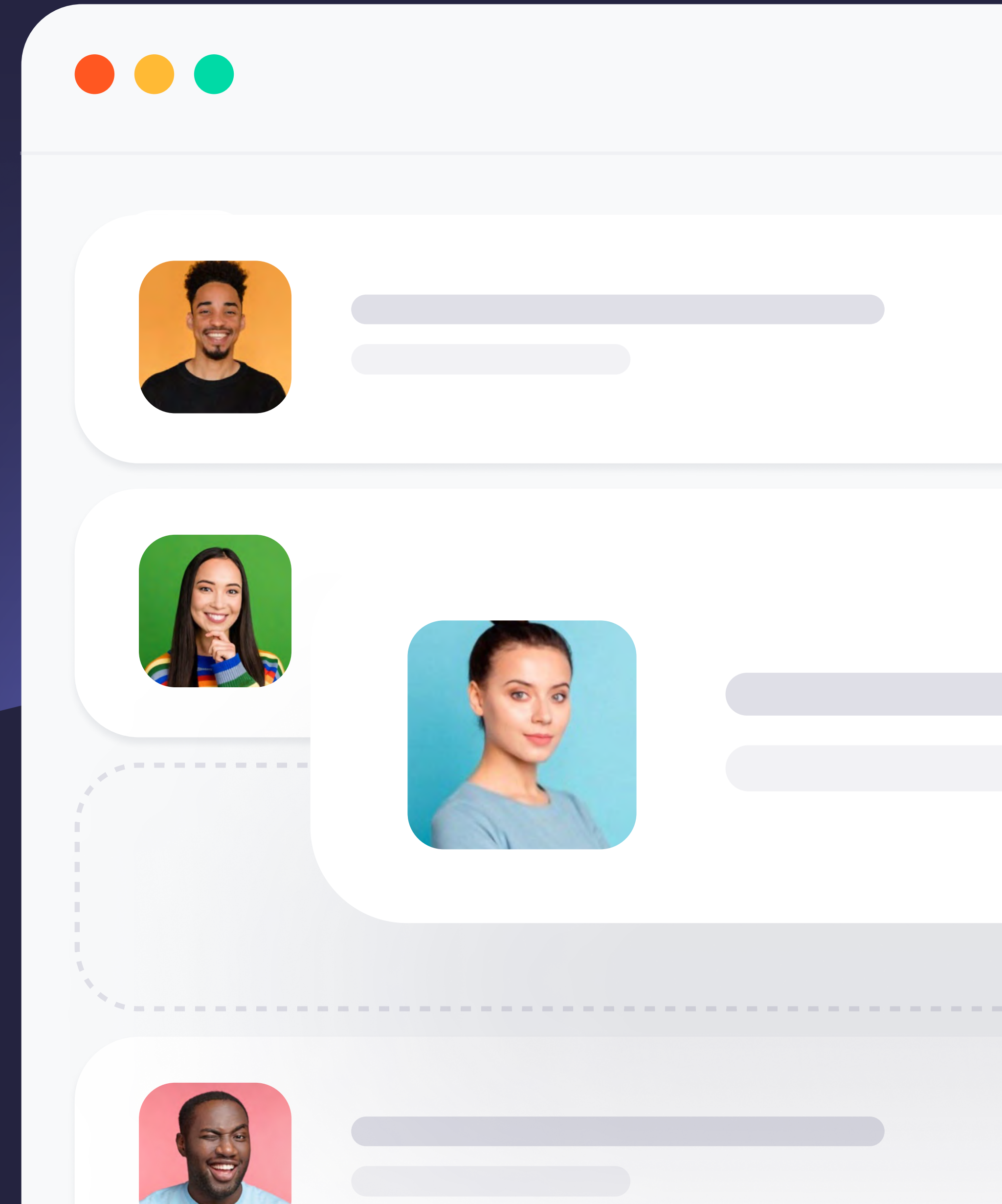




HANDOFF SOP:

How To Prevent Dropoff In The Funnel Stage No One Talks About

CHILI PIPER IN PARTNERSHIP WITH JBARROWS





While the future of sales development in B2B is a hotly contested topic, the prevalence of the role has never been greater.

Zippia estimates over 700,000 sales development reps employed in the United States, and LinkedIn currently lists north of 58,000 job openings in the U.S. alone.

With the massive growth in the industry, sales development leaders have a lot on their plates.

Not only are they tasked with enabling their teams to deliver high-quality leads and opportunities to sales, but they must also hire, develop, and retain their teams in an increasingly competitive market.

With so many potential areas of focus, you may be wondering where to invest your time and energy this year. Product training? Objection handling? Tech investments? Process improvement?

We'd like to make the case for spending time on an often forgotten — but crucial part of an SDRs job function — handoff.



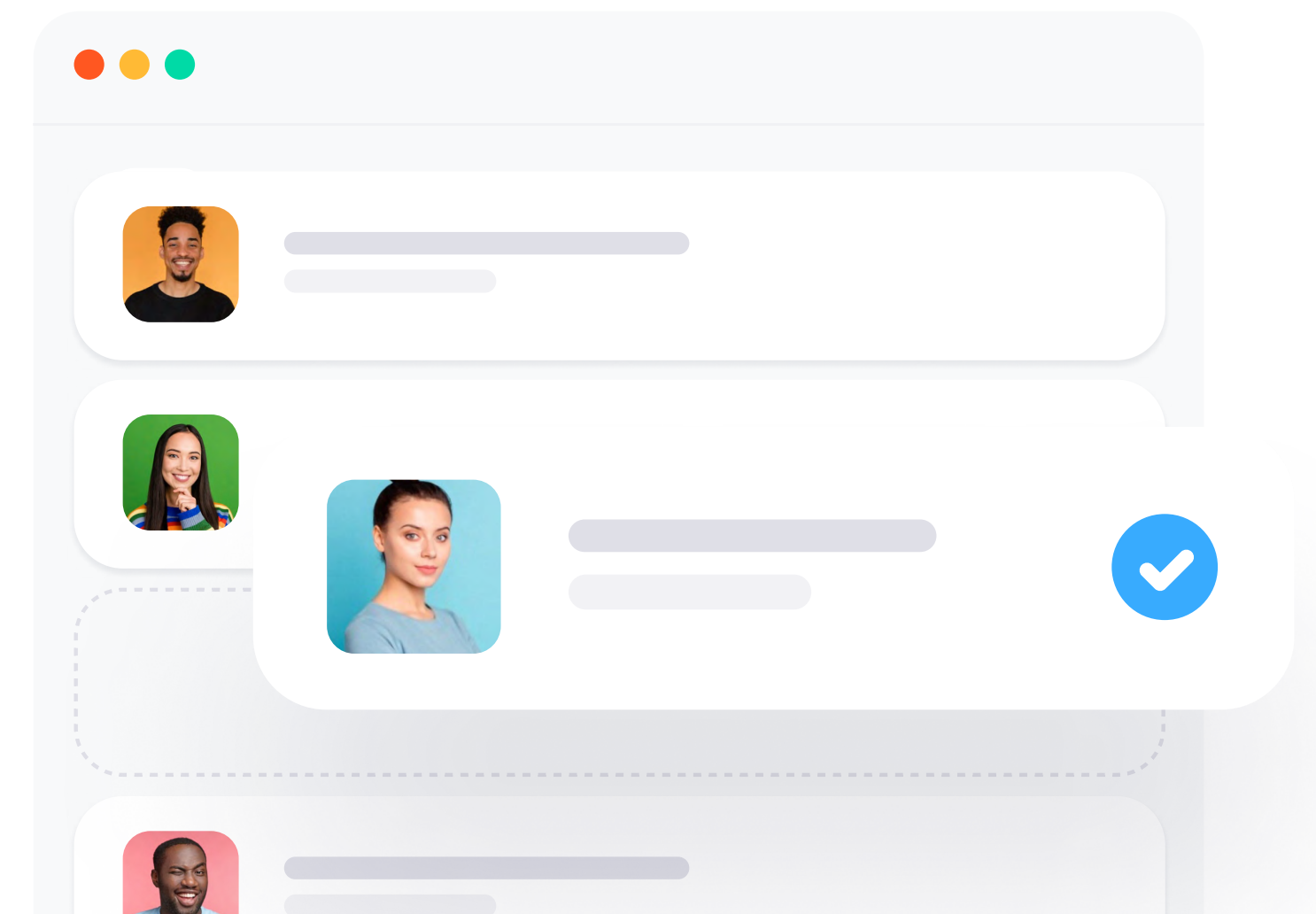
What is handoff?

Handoff refers to the point in the sales cycle when an SDR hands a qualified lead off to an account executive.

It sounds simple, but it's one of the most crucial points in the sales cycle and is frighteningly easy to mess up. And with no clear industry standard for how to execute handoff properly, it's the source of a lot of dropoff in the funnel.

So what gives? How can sales and SDR leaders ensure their teams are equipped to execute flawless handoffs to increase meeting held rates and deliver a positive customer experience?

We spoke with three sales development leaders to learn how they're coaching their teams to achieve smoother handoffs.





Meet the leaders



Emmy Johnson

VP of Sales at MarinaLife



Brian Smith Jr.

Revenue Enablement Manager at Vention



Drew Coryer

Sales Development Manager at Webflow





HANDOFF TIP #1

Clearly define *qualified*

The term “qualified” means something different in every organization. Generally speaking, though, qualification is a measure of both fit and intent.

There’s usually an objective element:

- Does this prospect use Salesforce?
- Does their company fall within the industry or growth stage we best serve?

And a subjective element:

- Is this the right person to evaluate our product?
- Are they ready to buy?

One of the biggest sources of friction between SDRs and AEs is disagreement about whether a lead or opportunity is, in fact, “qualified.”

There’s a lot of subjectivity involved in determining if something is qualified or not. The lack of alignment impacts the number of opportunities that make it into a seller’s pipeline and the probability of those opportunities closing.

Drew Coryer, Sales Development Manager at Webflow, recommends creating clear criteria for qualification that’s agreed upon by all parties.

“It really helps when you have strong guidelines on when you move things to different stages. We can hear and see those things on a call or in an email chain. When that’s in place, it’s really easy for me as an SDR manager to go to the AE and say, ‘Hey, I think this one should be a qualified opportunity,’ or, conversely, for the AE to say, ‘I think we left some on the field here. This is probably not qualified yet,” says Drew.

Clear qualification criteria incentivize SDRs to only pass quality leads on to AEs, and it empowers them to push back when an AE is hesitant to accept an opportunity into their pipeline.



HANDOFF TIP #2

Re-think your qualification framework

If you've been in sales development for a while, you're doubtless familiar with a slew of qualification frameworks — BANT, ANUM, MEDDIC — you name it.

Older frameworks, like BANT and ANUM, prioritize budget as a core qualification criteria for passing leads.

But this is problematic for a few reasons. According to Drew, too much emphasis on budget before any value is demonstrated can be detrimental to deals.

“I think it probably costs us more deals than we realize when we talk about budget in the first call instead of really aligning on the value and the impact of what we bring to the table. Psychologically, it just makes sense. Because if I say the price point is \$100,000, every single feature that I list off, the prospect is going to have that little voice in the back of their head thinking, ‘is that worth a hundred grand?’” he said.

Instead, Drew advocates for newer qualification frameworks, specifically the [SPICED model](#) from Jacco van der Kooij, founder of Winning by Design.

In the SPICED model, business impact is prioritized over budget during the qualification stage, allowing reps to uncover the underlying reasons the prospect is engaging, resulting in more value-driven conversations.

Adopting a newer qualification framework not only drives deeper conversations, it also enables SDRs to pass more leads that would traditionally be considered “unqualified” purely based on premature budget concerns.



HANDOFF TIP #3

Skip the SDR discovery call

It's no secret the B2B buyer experience has changed. The way we sell must also evolve to meet the needs of modern buyers.

Before, vendors were in complete control of the sales cycle. But as more players enter the space and information becomes more widely available, that power dynamic has shifted. Buyers are in the driver's seat now.

By the time a buyer raises their hands or agrees to meet with a vendor following a cold outreach, they expect to be able to see the product and have their questions answered as soon as possible.

The solution? Eliminate unnecessary steps from your sales cycle.

Today, many companies still require an SDR-led discovery call before a prospect can even connect with an AE. And often, the first call with the AE is just another, longer discovery call, meaning buyers don't get a glimpse of the product until the third or fourth call with a vendor.

This is a frustrating experience for buyers, and the added steps may no longer serve the same purpose for vendors they once did.

Instead, try to consolidate as many of these steps as possible into a single call. If an SDR gets ahold of a prospect on a cold call, have them ask basic qualifying questions right then and there, eliminating the need for a secondary discovery call.

According to Emmy Johnson, VP of Sales at MarinaLife, you can even preview the product for a prospect throughout the discovery call, giving the prospect what they want upfront while also allowing your reps time to ask deeper discovery questions.

"I'm not a big fan of the 15-minute discovery call with an SDR. I like to remove that as much as possible to shorten the sales cycle. So, if an SDR gets on the phone with someone or connects with them via email or LinkedIn, they should be able to get all the qualifying information needed to pass it straight over to an AE. The qualification questions should be agreed upon ahead of time by leadership, that way there is no ambiguity.

"From there, the AE can reiterate the purpose of the call upfront. They can say, 'Hey, the purpose of this is to make sure we're aligned. I'm going to ask you some questions, verify some information the SDR gave me, and if you're still interested, I'd love to give you a little, what I call lightning demo, or a peek under the hood, right. How does that sound?'

"That way, the prospect is still getting a taste of what the product looks and feels like but the AE is able to qualify them and do more discovery if needed. If at the end of the call it isn't the right fit, that's okay. But if there is a fit, then the next step would be a more technical demo, led by a sales engineer or solutions consultant and customized just for them," says Emmy.



HANDOFF TIP #4

Automate scheduling

One of the most impactful things you can do to empower SDRs to execute smoother handoffs is to implement a calendar booking function in your process.

In the old days, a prospect would agree to take a meeting during a cold call or email exchange. Then the SDR would perform mental gymnastics trying to coordinate calendars, time zones, and availability for all relevant parties.

Luckily, there's tech out there now that automates the back and forth of manual scheduling.

created in partnership with JBarrows

According to Brian Smith Jr., Revenue Enablement Manager at Vendition, this functionality isn't just a nice-to-have. It's a necessity.

"You need Chili Piper — it's got to be a part of your tech stack. The most common way I see people use it is for SDRs to book directly on an AE's calendar. It used to be for the SDR to book the meeting with the AE, they had to take time to look on the calendar and find times, then they had to introduce the AE over email, and on top of that they had to brief the AE on the context of where the prospect was in their evaluation," says Brian.

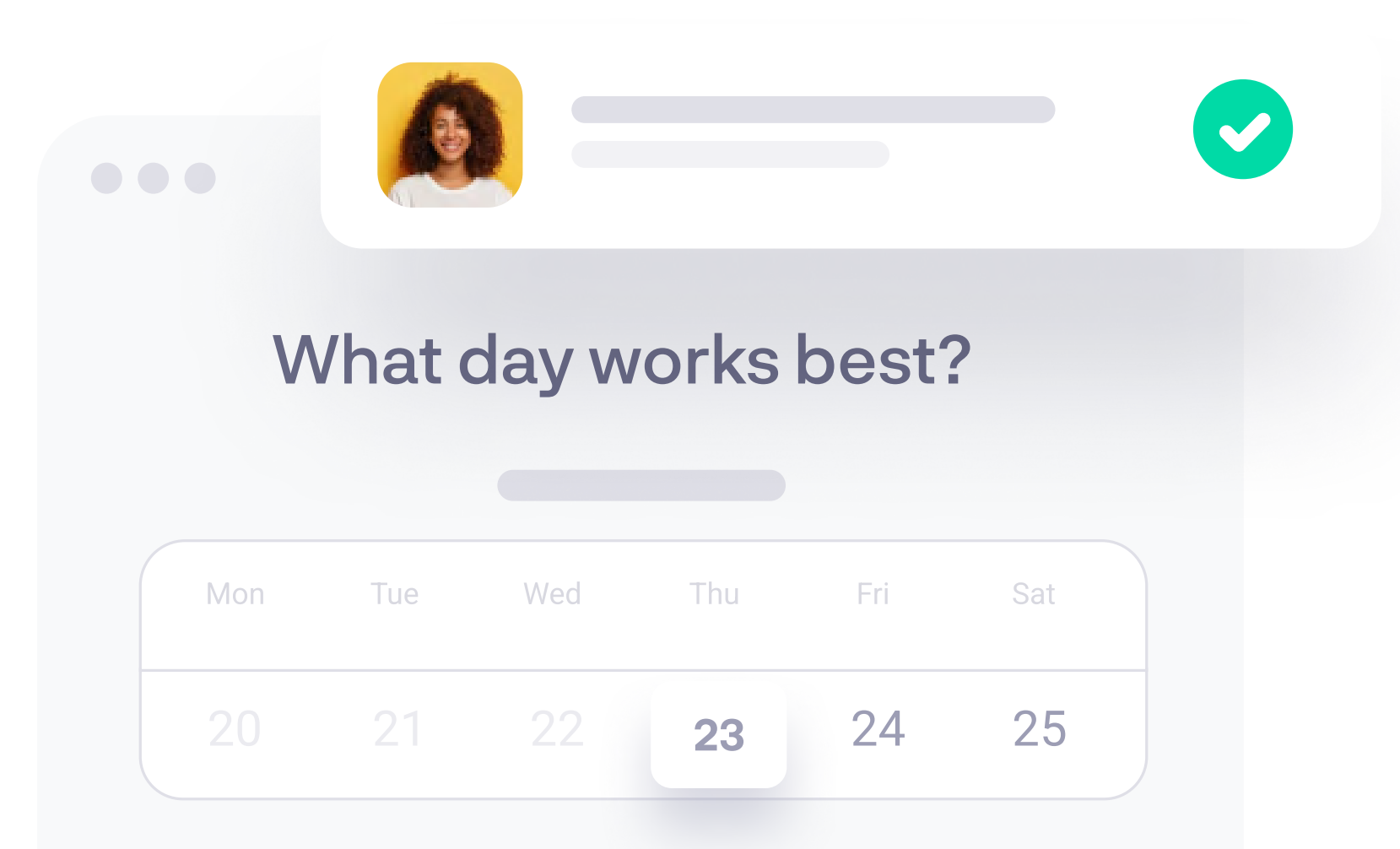
Teams using Chili Piper can skip these manual steps.

Drew has seen similar success using Chili Piper, specifically in organizations where SDRs are round-robinning leads to multiple AEs.

"At my previous organization, we used Chili Piper as well. And there was a big gap between the experience that we were having pre-Chili Piper and post-Chili Piper, especially when it comes to multiple people booking across the whole field.

"When you have a team of 12 people and you're booking for 24 AEs, the chance of being booked at the same time actually goes way up. And you don't want to be double booking someone at the same time. You don't want to skip them in the round-robin or double book them in the round-robin. Because then someone else gets skipped, and it's little things like that that go into the head game that is sales.

"By creating a lot of transparency and creating a smoother process, it allows us to focus on the actual conversation — the use cases and the benefits that we're bringing to the table, rather than, "I should've gotten this lead, so-and-so should have got that lead," says Drew.





Putting it all together

Regardless of how your sales org is structured, delivering a good handoff experience is hard to pull off. And with so many potential areas for SDR teams to hone their craft, handoff may feel like an afterthought to some.

But, in reality, poor handoff processes result in missed opportunities.

To avoid falling victim to the curse of missed opportunities, you need to prioritize streamlining your handoff process.

Ask yourself questions like: Is a "qualified lead" clearly defined? Do SDRs have a mechanism to schedule time directly with AEs? Is it time to consider automation?

And, of course, don't forget to bookmark this page. You never know when you'll need a few friendly words of advice as you embark on your handoff optimization journey. 🚀

Looking for more actionable sales advice from experts in the field? Be sure to [join the J Barrows community.](#)

If you're interested in seeing how Chili Piper can help power your handoff process, [get in touch with us today.](#)



Chili Piper is the most advanced routing and scheduling software. We help revenue teams convert more leads into attended meetings, book more demos faster, and delight their customers.

Do you want to see us in action?

[GET A DEMO](#)