

# Handoff With Their Heads

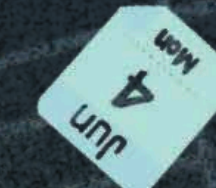
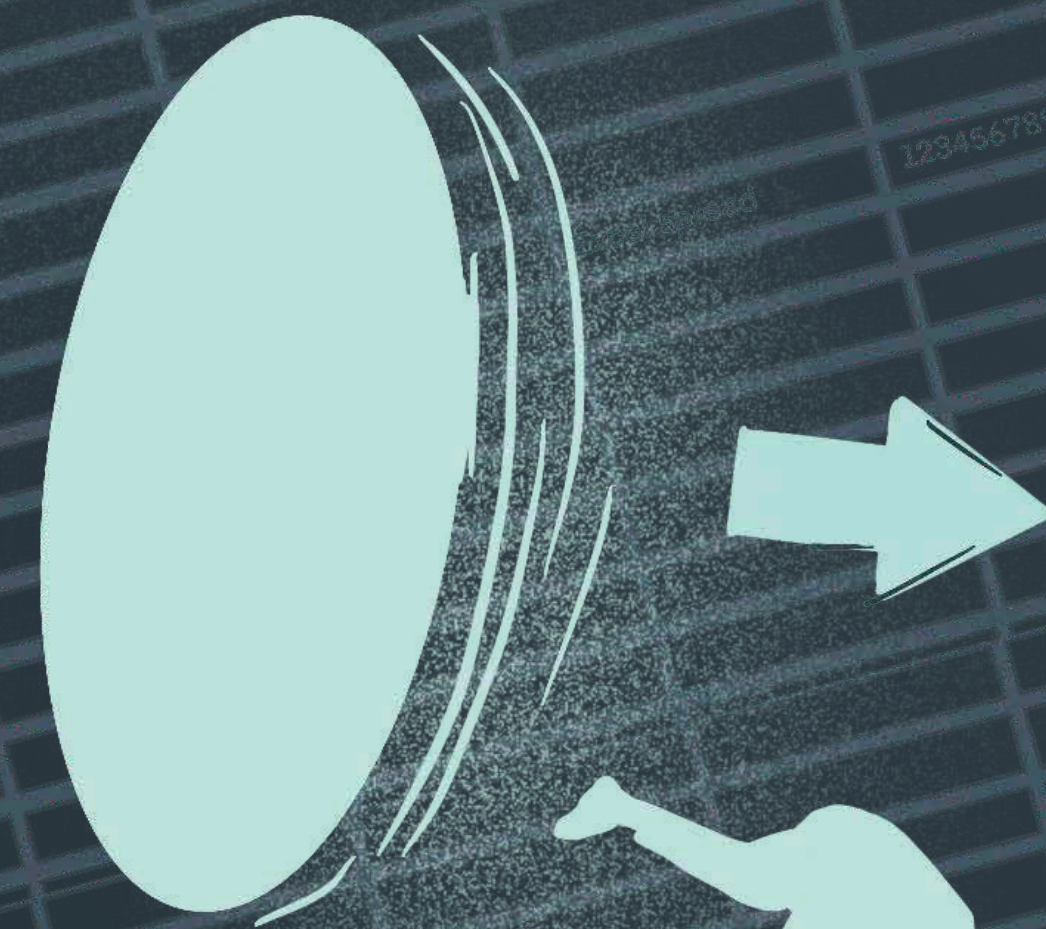
A Lead Routing Graphic Novel

**One sales development rep's adventures  
through the lead routing spreadsheet**

(And how to fix these issues, literally, today)



**CHILI PIPER**



# Featuring expert commentary from



**Gillian Wyatt**

Lead SDR



**Maggie Siciliano**

Enterprise SDR



**Carter Young**

Outbound Manager



**Jack Veronin**

SDR Manager



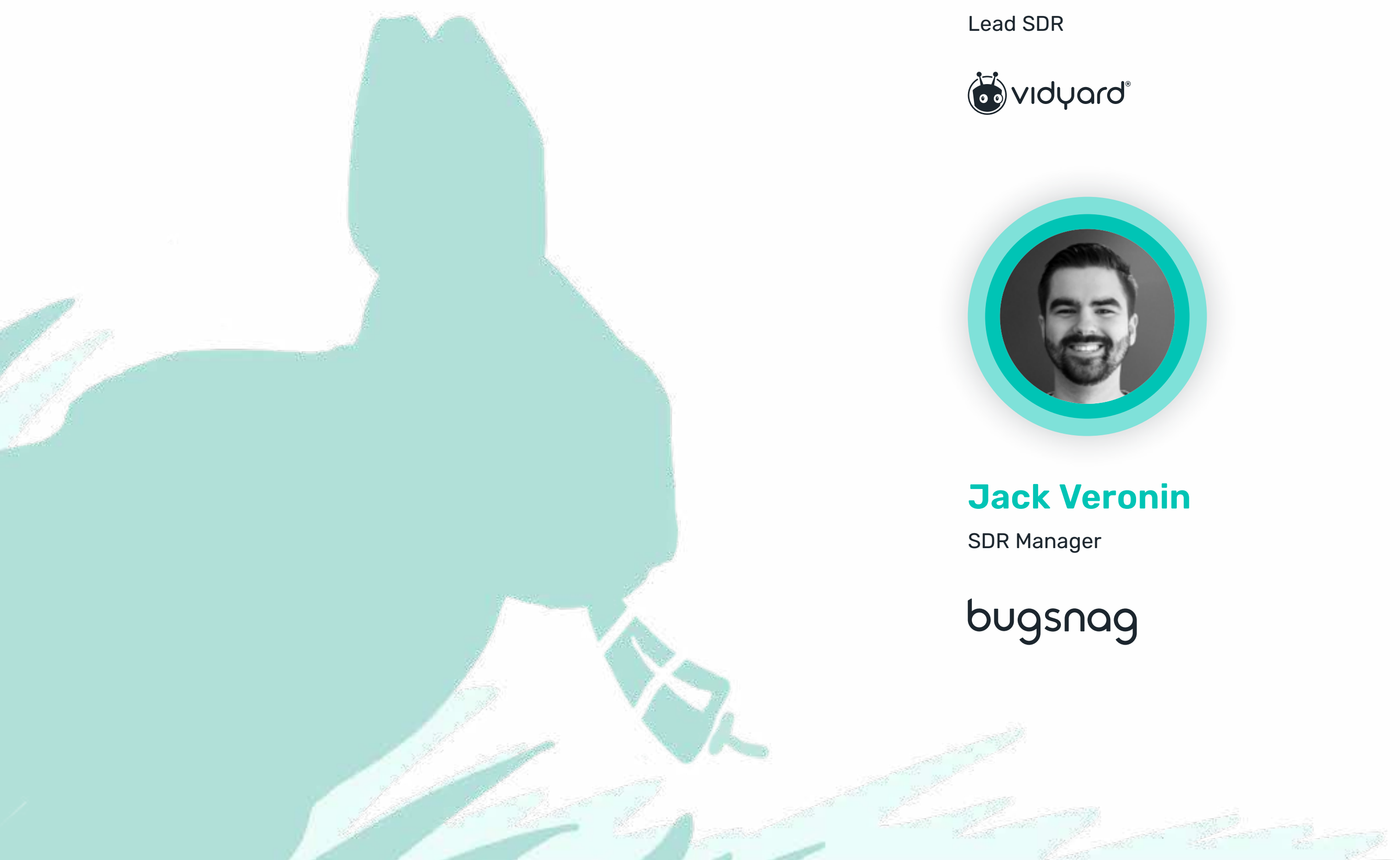
**Jaime Stilwell**

Customer Success Manager



**Jimmy Parrillo**

Sales Development Team Manager



# Table of Contents

This book is dedicated to thousands of SDRs who know lead routing doesn't have to be such a mess.  
**We feel you.**

CHAPTER 1	<b>Down the Rabbit Hole</b>	<b>4</b>
CHAPTER 2	<b>Into the Spreadsheet Maze</b>	<b>7</b>
CHAPTER 3	<b>A Round-Robin Party</b>	<b>8</b>
CHAPTER 4	<b>The Account Executive Won't Flip the Opp</b>	<b>10</b>
CHAPTER 5	<b>The Cheshire Manager</b>	<b>11</b>
CHAPTER 6	<b>Zoom Link Croquet</b>	<b>12</b>
CHAPTER 7	<b>Crossed Wires</b>	<b>14</b>
CHAPTER 8	<b>The Trial</b>	<b>15</b>
CHAPTER 9	<b>It Was Only a Dream</b>	<b>17</b>



## CHAPTER 1

# Down the Rabbit Hole

Alice was getting very tired of dialing. We find our heroine in the most natural of settings—not a sun-dappled, riverside glen had this book been written several centuries earlier, but in an open-floor office armed with a headset, logged in and dialing.

It's her third week as a sales development rep (SDR) and she's learned a ton, but the pressure to book a meeting is mounting.

Alice's thoughts wander. She opens LinkedIn and mindlessly scrolls but closes the window just as her manager walks by. She hits "Resume" and continues dialing. Mostly dead numbers. An auto-responder. A 1-800 number. And then wait—what's that? A hit.

Alice sits up, clears her throat, and gives an impassioned read of her script. To her amazement, the caller doesn't hang up or interrupt. He says, "OK." OK? Nobody has said that yet. "OK, you want to book a meeting?" she repeats, trembling. "Yup. Looking at my calendar," says the caller.



Alice mutes herself, leaps up, looks around, and suppresses the urge to shout. She catches a glimpse of an account executive running past. The account executive is looking at their watch, muttering, "Late ... late! ... very important date ..."

Alice calls to the account executive, but the account executive doesn't hear. Alice leaps up to follow, but trips ...

... and tumbles into a giant spreadsheet-shaped hole that appears before her.



## Routing meetings should be a no-brainer, but it's often convoluted and starts with decoding a big spreadsheet.



*"When a lead comes in, and SDRs have to figure out where to route it to, that's where a lot of the SDR war stories come from. Salesforce isn't exactly always clear."*

- Gillian Wyatt, Lead SDR at Vidyard



*"I saw it all the time in telecom. They would ignore SDRs and just stop showing up to meetings because they didn't trust them."*

- Carter Young, Outbound Manager at Brandfolder



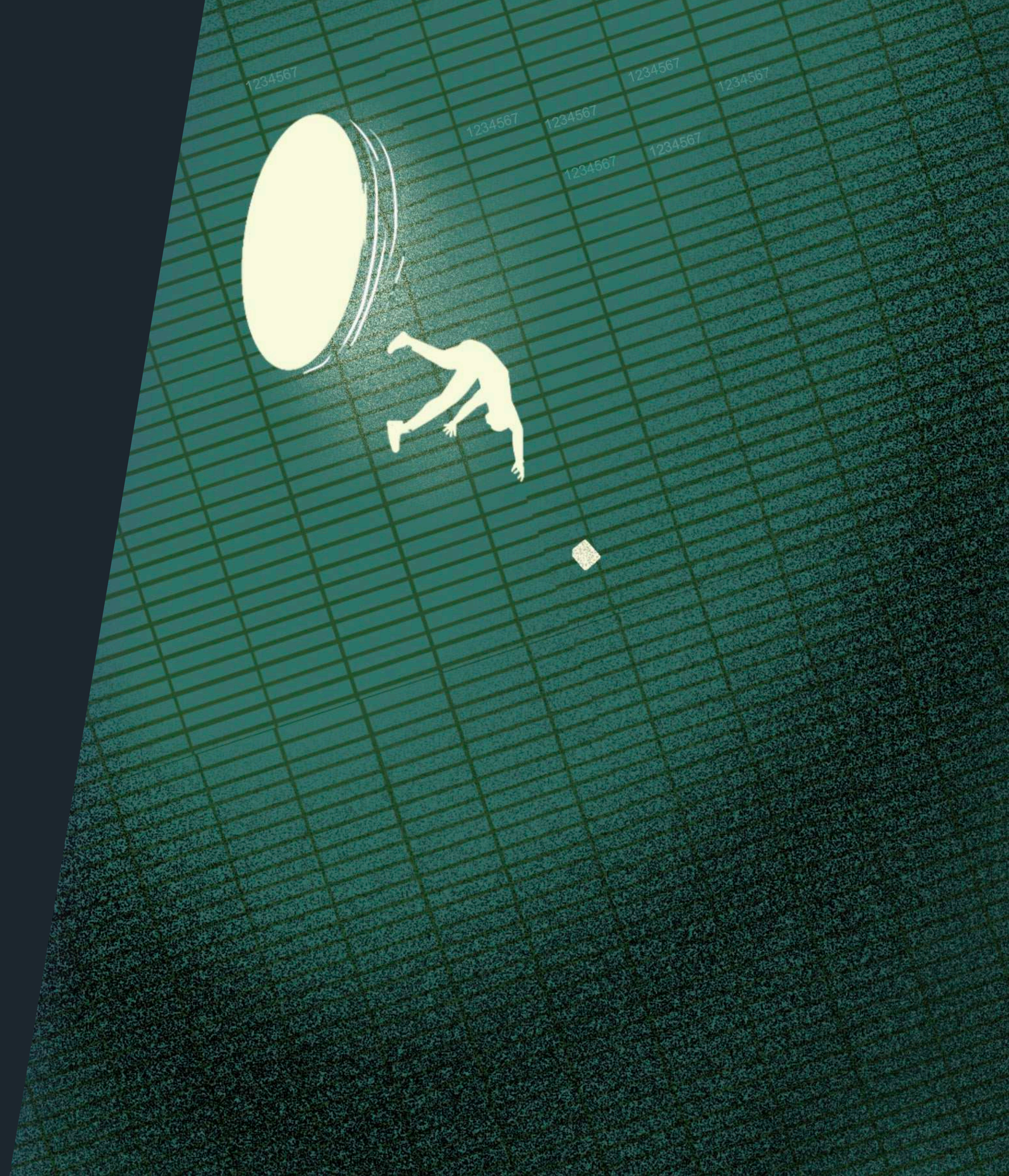
*"That spreadsheet was responsible for perhaps 90% of our misunderstandings."*

- Anonymous



*"You get a meeting and you're excited and want to do everything right, but the spreadsheet is massively confusing and nobody wants to help you."*

- Anonymous



## CHAPTER 2

# Into the Spreadsheet Maze

Alice tumbles for what feels like an eternity. Thousands upon thousands of color-coded cells whiz by. Finally, she lands softly on an open Tab. She's now at the bottom of the spreadsheet. Tunnels fan out like a maze in every direction. Which way should she go? How does she book this meeting?

Each passage is labeled with acronyms she doesn't recognize. Next to her lies the meeting, which still needs an account executive. She must find that one she was following, wherever they've gone.

Alice finds a key on a table and tries one door. It opens, but the person inside shouts, "This is the entertainment vertical!" and slams it shut. She tries the key on another door and the person inside shouts, "This AE is on vacation!"—and then there's a rumbling. From that doorway pours a flood of out-of-office messages and Alice, the table, and everything in the room are swept away.

Had enough?



ESCAPE THE SPREADSHEET



**Spreadsheets don't explain themselves. They're a maze—especially to new hires.**

*"Almost everyone has had the experience of accidentally hitting 'Delete' and then realizing with horror what you've done—you just messed up something important."*  
- Anonymous

*"We try to keep as much as we can in Salesforce. spreadsheets always get messy. Everyone has their own way of using them."*  
- Jack Veronin, SDR Manager at Bugsnag

*"The first time, I just stared and stared at [the spreadsheet] and thought, wow I am just not getting this."*  
- Anonymous

## CHAPTER 3

# A Round-Robin Party

Alice crawls from the river and finds a bunch of people having a tea party by the bank. They chatter excitedly. Some talk about new logos. Others talk about harrowing renewals and heroic upsells. One wears a top hat reading “MOPs” and invites her to join and launches into a series of questions.

“How are you finding things?”

“Well, I ...”

“Very straightforward, no?”

“It’s, umm ...”

“What’s so confusing about leaving notes then?”

“Come again?”

“Your handoff notes! Why don’t you leave better notes?”

“Why gosh, I hadn’t ...”

They’re interrupted when one of the characters announces, “Let the round-robin begin!” The person in the MOPs hat leaps up and pours a stream of calendar invites from a giant teapot into everyone’s cups. Some cups overflow with meetings. Others go virtually untouched, and their owners beg for more.

“Please be fair. And no side deals!” he cries, but everyone is now shouting over each other. They argue, jockey, bribe, barter, and make unrealistic promises.

“That company is on Salesforce!”

“No way, that SDR is too junior.”

“Hey, this company just got funded!”

“But you already got one!”

“Hey, that’s *my* region!”

“Favoritism!”

“First touch!”

Amidst it all, Alice holds up her meeting and shouts, “Would anyone care to take *my* meeting?” They all pause. One ventures a question: “How long have you been here again?” When Alice replies, “Three weeks” they all cry out and scatter in the woods, leaving her once again alone.

Had enough?

[ESCAPE THE SPREADSHEET](#)





## Spreadsheets can't enforce themselves. They open the door to bias, and favoritism.



*"At a previous company, the way the sales team would hand off accounts was they'd just add them to a shared CSM calendar and wipe their hands of it. The senior CSMs would cherry-pick all the best ones leaving me and one other new person with all the bad ones."*

*- Jaime Stilwell, CSM at Chili Piper*



*"There's a lot of horror stories, not where I'm currently at, but at companies where this type of lone wolf type salesperson can be successful without doing anything for their coworkers."*

*- Carter Young, Outbound Manager at Brandfolder*



*"Sometimes AEs would go directly to a CSM to be like, 'Hey, you need to take this account. You help me, I'll help you.'"*

*- Jaime Stilwell, CSM at Chili Piper*



*"It's really about relationships, who's close to who. Sometimes someone only gives stuff to their friend."*

*- Anonymous*



*"You go through all this and the salesperson is like, 'Well, did you go ask them this or that?' And now you have to go back and say, 'I can't schedule this until I know whether you have budget.'"*

*- Anonymous*



## CHAPTER 4

# The Account Executive Won't Flip the Opp

Alice's wanderings take her deeper into the woods. She emerges from a thicket only to run into, of all people, that same account executive!

Mistaking her for his assistant, he cries out to her, "Hey, why aren't you prospecting into my territory?" To which Alice replies, "Oh, I have! In fact, I have this meeting right here." She pulls it out and shows it to him. "Won't you take it?"

"Why!" cries the account executive, now incensed. "Nobody tells me which meetings to take! Do you know how many of these simply *appear* on my calendar? Just the other day I was put

on a call with someone who didn't even speak the same language. And another where they got on and tried to sell *me*. Can you imagine! Such poor qualification. So I hope you can understand that I don't mean anything personally when I ask, 'How do I know if this one is any good?'"

"Well," replies Alice, "I think they want to ..."

"Have they any budget? Authority? Need? *Timeline?*"

"Well, I'm only certain of ..."

But before she can finish, the account executive glances at their calendar, shrieks, and runs off.

Had enough?



ESCAPE THE SPREADSHEET

**If the process isn't defined in software, every account executive will rely on their own criteria.**

*"We are there to service the AEs, certainly, but we are not personal assistants."*

- Carter Young, Outbound Manager at Brandfolder

*"We used to have a term called 'icing.' If an account executive was given us too much flak, you'd get iced out for a couple ops. The router didn't matter."*

- Anonymous

*"Often AEs have very little understanding of what just popped on their calendar, especially at larger companies. It's high volume, low conversion, and it creates bad incentives."*

- Anonymous



## CHAPTER 5

# The Cheshire Manager

Despairing, Alice sits down on an oversized bean bag. Why is this all so confusing? Why isn't anyone stopping to help her? She feels lost. "Here is this perfectly good prospect trying to purchase," she says to herself, "and here I am going on this awful adventure just to put them in touch with someone."

Alice notices something in the tree above her—a growing smile materializes into a big cat. "Where are you trying to get to?" the cat asks. Nonplussed, Alice replies, "The funny thing is, I can barely remember myself. So it's hard to say. Do you know the way?"

"Of course I do," laughs the cat. "But which way you want to go depends on where you want to be, and if you don't know where you want to be, it doesn't much matter which way you go."

"That doesn't make much sense," says Alice. "I know!" laughs the cat. "We'll talk about it in our one-on-one." Its voice trails off and it disappears into another meeting.

"Trust the spreadsheet," whispers the cat's disembodied voice.

"And read Sandler."

Had enough?



ESCAPE THE SPREADSHEET

**Lots of organizations underestimate the cost of lead routing back-and-forth. If they did, they'd do everything they could to speed up handoffs.**

*"People who do well in this role have to be willing to help bring up the people around you, or the company. Otherwise, you have no place in my universe."*

- Carter Young, Outreach Manager at Brandfolder

*"There's this anxiety around asking how to route something. You don't want to look like you don't know, even if you definitely don't know. And sometimes, everyone else is just too busy to see you need saving."*

- Anonymous



## CHAPTER 6

# Zoom Link Croquet

Alice overhears yelling on the other side of a hedgerow. She pushes her way through and emerges into a part of the spreadsheet she hadn't noticed before.

Here, there's a meadow filled with Zoom links. At its center, the head of sales plays croquet using one of the links as a mallet. If only Alice can get a hold of a meeting link, she thinks to herself, she can book a meeting and update it once she finally convinces the account executive to join. She makes a dash for an abandoned link but the head of sales notices and roars, "Do you have what it takes?"

Alice stops.

"Do I have what *what* takes?"

"What *IT* takes," says the head of sales dramatically. "To *sell*."

"Well, I hardly see how that pertains to what I'm trying to do here ..."

"Can you sell me this spoon?"

"I'm actually lost now."

"Enough!" shouts the head of sales. "I simply will not stand insubordination."

Alice stands silently, her temper thin.

**Ironically, spreadsheets do help train in one area of selling—dressing up questionable meetings to pass them off as qualified.**



*"When we hire SDRs, we aren't looking for someone who'll just do the minimum. Who'll just sit and wait for things to come to them. We're looking for whether someone can learn something new, organize it in a way others can understand it, present it, and chase the meeting down."*

*- Jack Veronin, SDR Manager at Bugsnag*



*"Don't be afraid to call out those red flags early, during handoff. What I see in a lot of discovery calls gone wrong is the SDR kept quiet. As soon as the customer brings up that one red flag, the account executive will think, alright, this is crap. This was a waste of my time. Whereas if they knew it was coming, they could prepare, and maybe it'd be better than expected."*

*- Jimmy Parrillo, Sales Development Team Manager at Twilio*





Do you play quota crusher-quet?"  
the head of sales asks Alice.  
"Yes, certainly. Or at least I want to."  
"Then let's play!"

Several guards set up a new game. The head of sales hands Alice a Zoom link. Just then, the account executive she's been pursuing all this time dashes by. Looking down at the link in her hands, Alice takes off in pursuit, determined to end things.

Behind her, the head of sales cries: "Stop! Handoff with her head!"

Alice catches the account executive, who is caught completely off-guard and is cowed by her intensity. Alice takes a two-pronged approach—she promises to route good meetings while at the same time, threatens to ice the account executive out of the next few rounds.

Reluctantly, the account executive agrees to join. Elated, Alice opens the Zoom link and enters the meeting.

Had enough?



ESCAPE THE SPREADSHEET

## CHAPTER 7

# Crossed Wires

As promised, the account executive shows up to the call. They grill Alice on all sorts of questions she didn't think to ask the prospect. But then, a terrible thing happens. Another account executive joins.

Alice has chosen the wrong link. They are double-booked.

Rather than back down, the two account executives both feel they're best suited to take the call. But in the argument that follows, both end up agreeing that it belongs to the other, and both hang up.

Now the line is empty. It's just Alice.

Alice despairs. This meeting won't count! She's finished. Finally, long after the agreed-upon time, the prospect appears—late and entirely unapologetic. And the moment they speak, Alice realizes it is all indeed lost.

"Hey," says the prospect. "To be honest, I think you'd be a great fit for what I'm selling. Can you put me in touch with your boss?"

The prospect isn't a prospect at all! They're another SDR, here to reverse-sell her.

Through tears, Alice realizes she's routed a bad lead. When she exits the meeting, she finds a crowd waiting for her.

Had enough?



[ESCAPE THE SPREADSHEET](#)



**Every minute spent trying to “sell” a bad meeting is time spent not finding an actual deal.**

*“There was one scenario where people joined the wrong call. We have a document with all the account executives’ Zoom links. Everyone can edit it and sometimes, you end up pasting rather than copying. In one scenario, two account executives showed up along with stakeholders from each side. Everyone was confused.”*

*- Gillian Wyatt, Lead SDR at Vidyard*

*“Sometimes prospects show up and they’re only interested in learning, not buying, which isn’t what they told you.”*

*- Jack Veronin, SDR Manager at Bugsnag*

## CHAPTER 8

# The Trial

The head of sales finally catches up with Alice and demands she stands trial. Alice is too exhausted to resist. She is charged with the high crime of misrouting a lead and everyone she's met thus far lines up to testify.

To her surprise, they blame her for not following the spreadsheet. They claim it's the most rational system in existence, if only people like her could simply use it. Couldn't Alice appreciate the spreadsheet's intricate color coding? The fact that everyone has edit access? The terribly clever formulas? The lengthy 'Read Me' section buried on Tab 13?

Frankly, their arguments make no sense.

"Why didn't you wait until the part-time meeting coordinator was in on Monday to ask her?"

"Why not simply follow the color-coded numbering system? Mmm?"

"Didn't you see the note about inputting territory *before* inputting headcount?"

"Well, if someone accidentally deleted a formula, it must have been *you*."

It's all too much.

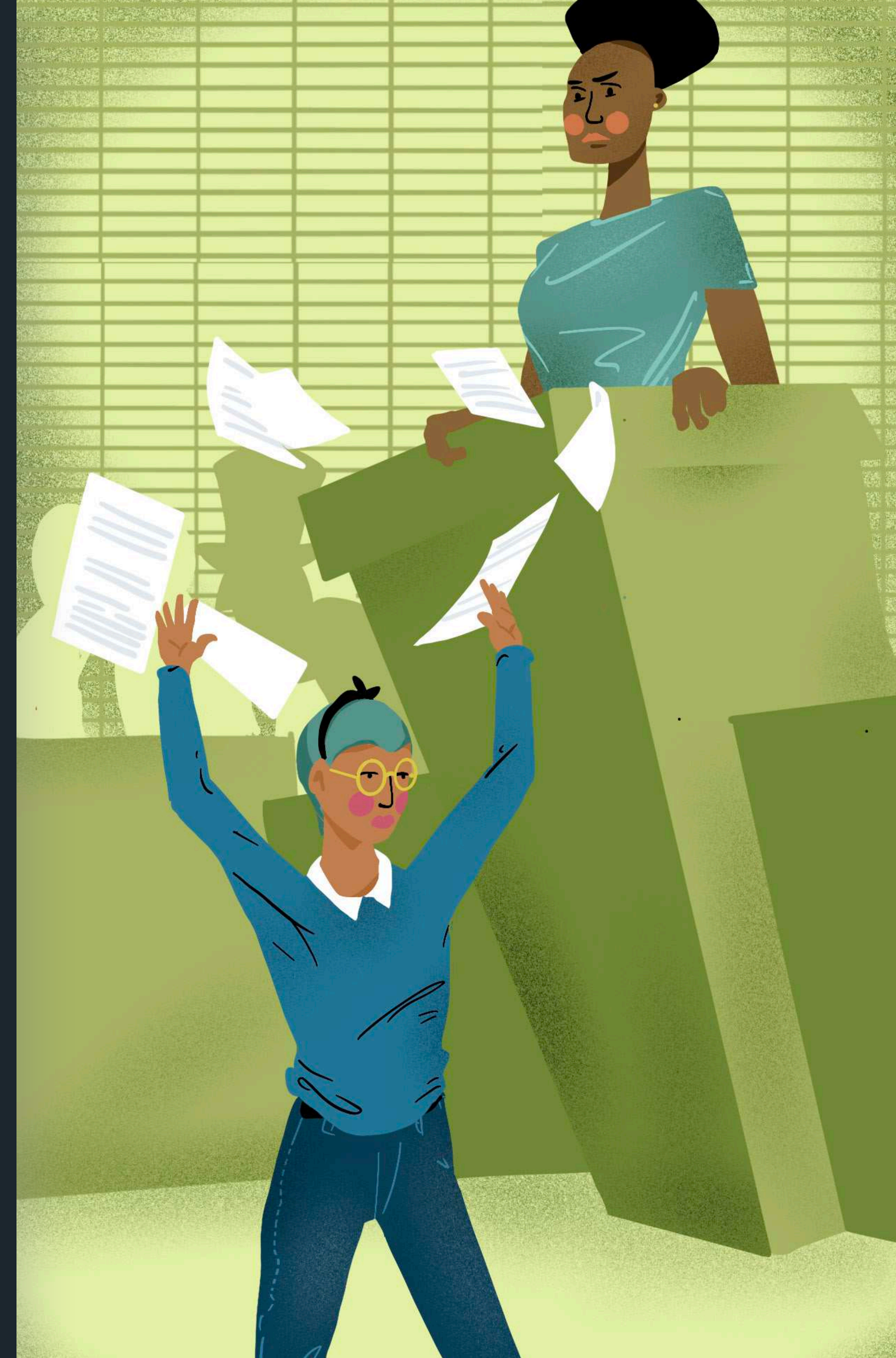
Alice rises. "None of this is real!" she shouts. "None of you are real! Nobody could possibly expect anyone to onboard in this environment. You sold me a bill of goods about this being a gateway into professional development and a career in sales but I haven't spent more than a minute actually talking to a prospect. When do I get to practice being a challenger? When do I get an actual sales coach? What on earth am I supposed to learn from all this admin work and wasting time with this terribly broken and not-at-all functional spreadsheet! I am not a meeting booker, I am a human being!"

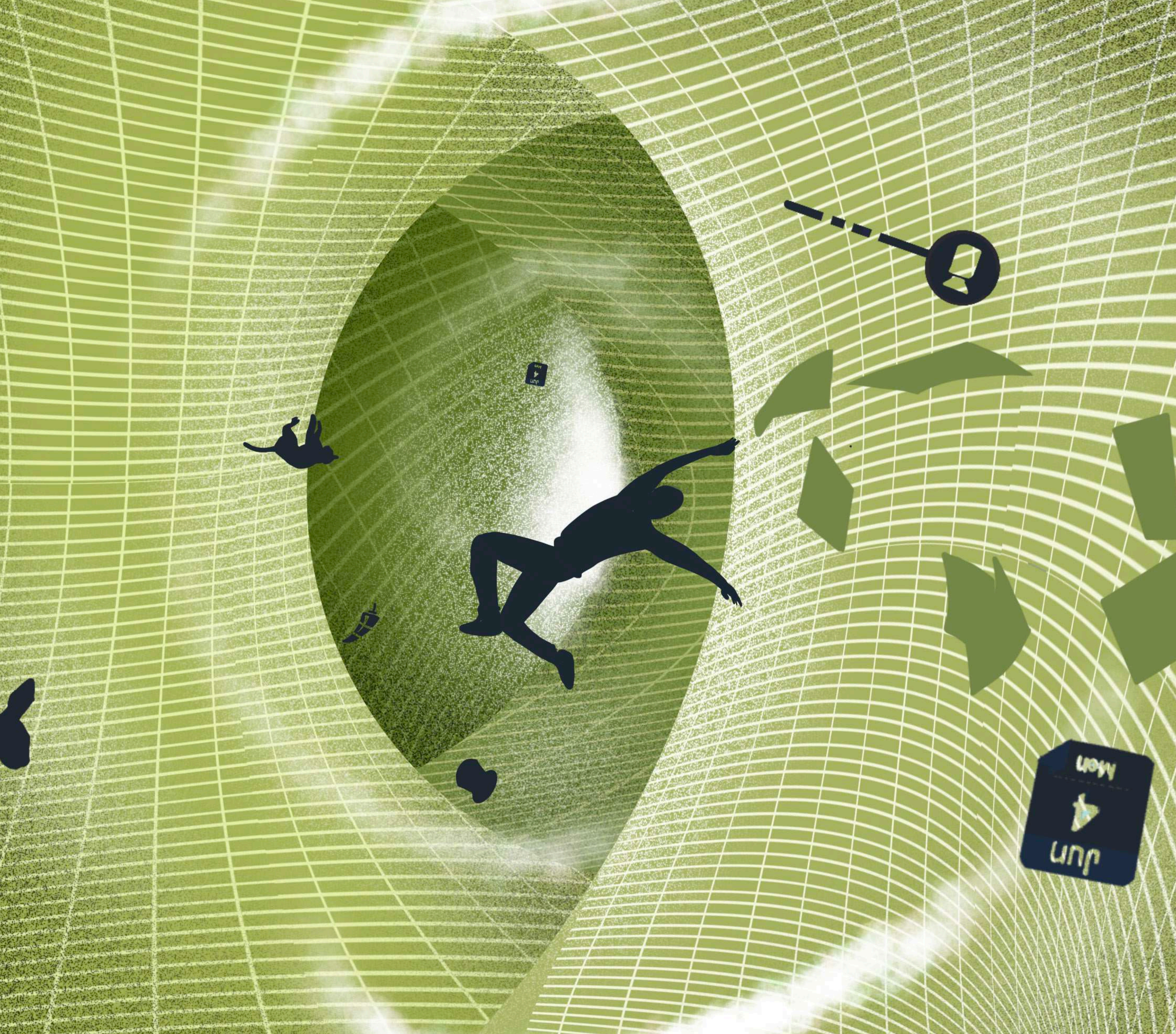
Alice tosses all the papers and suddenly, wakes up.

Had enough?



ESCAPE THE SPREADSHEET



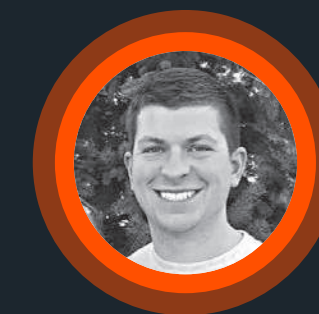


## Spreadsheets are a nightmare. Plain and simple.



*"The challenge for everyone is, how do you get your prospecting done quicker, and more efficiently? Anywhere you cut admin time, you increase selling time, and it decreases human error."*

*- Jack Veronin, SDR Manager at Bugsnag*



*"It happens everywhere—you go through all of this just to book a call, and the customer brings their whole crew expecting to see a demo, and the AE isn't ready to give a demo. And the SDR team is like, 'Hey, what do you want me to do? Our marketing team put a button that says, 'Request a demo.'"*

*- Jimmy Parrillo, Sales Development Team Manager at Twilio*



## CHAPTER 9

# It Was Only a Dream

Alice rises from her keyboard and wipes her mouth.

"I am so sorry," says her manager. Alice realizes her team is gathered around her. She must have fallen asleep. "I am so sorry for saying that," her manager says. "I made a bad joke."

"A joke?"

"Yeah, when you asked where to route the meeting I said, 'Check the spreadsheet' and you passed out. Must be trauma from a past job. We don't use those here."

"How do we route leads?"

"We don't. You don't have to do anything. It just happens."

"So my meeting is already booked?"

"Your meeting is booked."

"It went to the right person?"

"Uh-huh. You got credit."

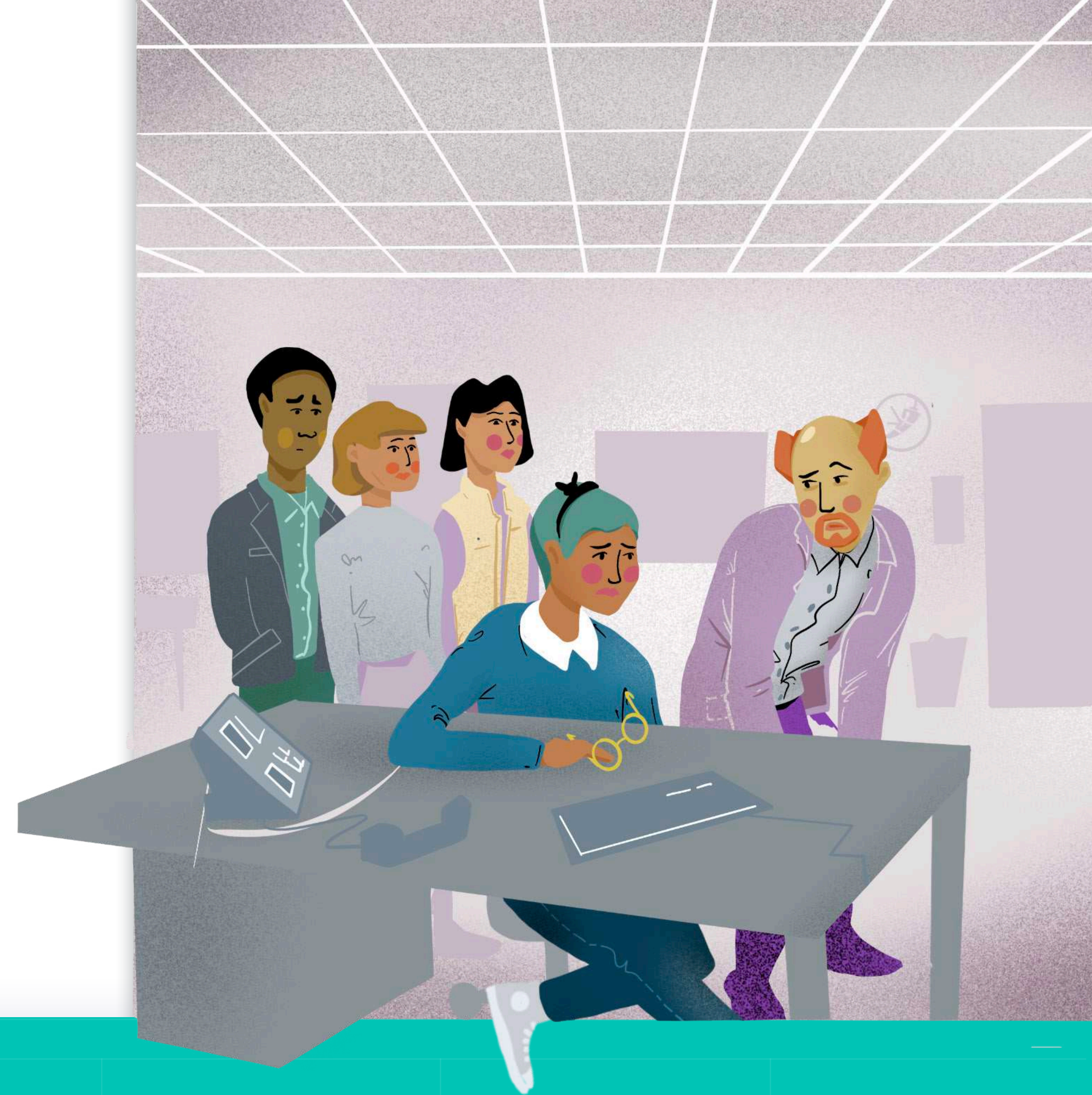
"All just a dream?"

"All just a dream."

"Wow. Spreadsheets. Such a nightmare."

You're almost out. 

ESCAPE THE SPREADSHEET RABBIT HOLE



**Prospecting and qualification is difficult enough without spreadsheets. The less people worry about routing, the more they focus on doing.**

*"I like to ask teams, on average, how much time each SDR is spending doing that mental math of routing? At 10 leads a day and five minutes per lead, that's 20 hours a month. What could you do with that time?"*  
- Jaime Stilwell, CSM at Chili Piper

*"Every company needs their SDRs and AEs working in better alignment. These are people you should be completely in sync with. The more you have AEs who have been SDRs, and the more SDRs can follow deals, the better they can support each other."*  
- Maggie Siciliano, Enterprise SDR at Demandbase

## Sound familiar?

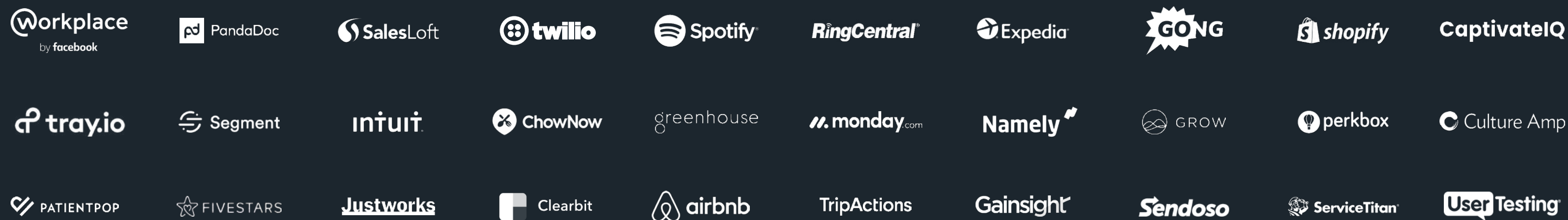
If you laughed or recognized these scenarios, you understand. Chili Piper was built to fix this.

## Chili Piper. Automate your handoff.

- ✓ Intelligent, rules-based lead routing
- ✓ Dynamic updates based on availability
- ✓ Automatically places a call on the right person's calendar
- ✓ Automatically reminds invitees the day before
- ✓ Prospects can easily reschedule with a smart booking link
- ✓ No spreadsheets or manual work
- ✓ No rabbit holes

[Book a meeting and see Chili Piper in action](#)

Used by the good people at:



**Life without the spreadsheet is pretty great.**



*"I remember when my previous company finally implemented Chili Piper. I remember it. It was life-changing. People think I'm being dramatic, but it was such a relief, because I knew that any meeting that was on my calendar wasn't because of favoritism. It was simply my turn. Our show rates for calls increased from 60% to 92%."*

*- Jaime Stilwell at Chili Piper*

