ExecWing

SDR & Revenue Assistant Handoff Checklist

Everything to prepare before a revenue assistant starts prospecting, sequencing and CRM work.

Ideal customer profile

- ☐ Target industries, company sizes and regions written down
- ☐ Buyer personas and titles prioritized
- ☐ Disqualifiers listed (who not to contact)
- ☐ Example 'great fit' accounts shared

Tools and access

- ☐ CRM user (HubSpot or Salesforce) with least-privilege role
- ☐ Sales Navigator or data tool seat
- ☐ Sequencing tool access (send-on-behalf rules agreed)
- ☐ Shared calendar link for booking meetings
- ☐ Password manager vault shared

CRM rules

- ☐ Deal stage definitions and exit criteria documented
- ☐ Required fields per stage listed
- ☐ Naming conventions for companies and deals
- ☐ Duplicate and merge policy
- ☐ Weekly pipeline report format agreed

Messaging

- ☐ Approved sequence templates and personalization rules
- ☐ Compliance rules (opt-out handling, CAN-SPAM, do-not-contact lists)
- ☐ Objection responses the assistant may use
- ☐ Hand-off rule: when a reply goes to a seller

Meeting booking

- ☐ Qualification questions before booking
- ☐ Meeting length, buffers and calendar rules

- [ ] Confirmation and reminder templates
- [ ] No-show follow-up process

Metrics to review weekly

Use activity and quality measures you already track, such as records cleaned, lists built, replies handled and meetings booked, and review a sample of the work for quality. Avoid setting targets before week four.

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