Buyer’s guide for sales outsourcing

2025

Getting started

Purpose: This document serves as a framework for organizations looking to evaluate outsourced sales development and lead generation partners.

Not all outsourced SDR vendors are created equal.

Some specialize in specific industries, bringing deep vertical expertise and tailored outreach strategies. Others excel at managing global campaigns, ensuring consistent execution across multiple regions. Certain providers offer flexibility in hiring, allowing companies to bring top-performing SDRs in-house as full-time employees.

Additionally, some vendors focus on advanced technology integration, while others emphasize hands-on training and coaching. Understanding these distinctions is key to finding the right partner that aligns with your company's sales goals and operational requirements.

Before crafting an RFP, it is important to align what your organization truly needs. Once those needs are clear, the RFP process helps gather valuable input from potential vendors.

Pre-RFP internal checklist

Start with this checklist to help your team assess the specific needs (and nice-to-haves) before building out the vendor short-list or RFP.

1. Scope of work

What specific sales development services do we need? (Check all that apply)

- [ ] Inbound lead follow-up
- [ ] Outbound lead creation
- [ ] Existing lead development
- [ ] Opportunity management/logistics
- [ ] Appointment setting
- [ ] Event support (pre-event outreach, booth engagement, post-event follow-up)
- [ ] Other: ________________

What are our primary goals for outsourcing?

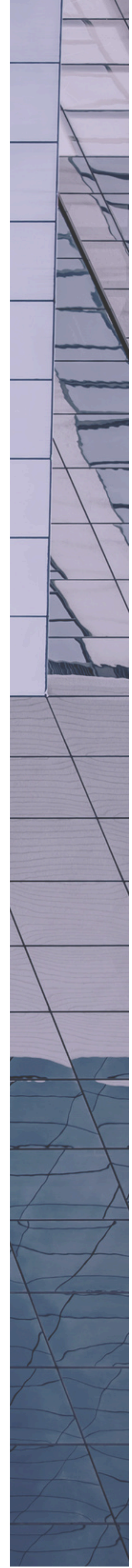
- [ ] Increase lead volume and pipeline generation
- [ ] Improve lead quality and conversion rates
- [ ] Expand into new industries or geographic markets
- [ ] Free up internal teams to focus on closing deals
- [ ] Shorten sales cycles and improve response times
- [ ] Other: ________________

How long do we anticipate needing vendor support?

- [ ] Short-term pilot (3–6 months)
- [ ] Ongoing, long-term engagement
- [ ] Flexible contract based on performance

What success metrics will determine if this engagement is effective?

- [ ] Number of meetings booked per month
- [ ] SQL (Sales Qualified Lead) conversion rate
- [ ] Pipeline contribution and revenue impact
- [ ] SDR responsiveness to inbound leads
- [ ] Other: ________________



2. Lead generation and qualification

Will the vendor need to source and qualify leads, or will we provide lists?

- ☐ Vendor sources leads
- ☐ We provide a target list, and vendor qualifies
- ☐ A mix of both

What are the most important lead qualification criteria? (Check all that apply)

- ☐ Industry and firmographics
- ☐ Technographics (specific tech stack used by prospects)
- ☐ Buying intent signals (engagement with content, recent funding, hiring activity)
- ☐ Other: ____________________

Do we require multi-channel outreach (phone, email, LinkedIn, video, SMS, etc.)?

- ☐ Yes
- ☐ No

How important is account-based marketing (ABM) experience in vendor selection?

- ☐ Critical
- ☐ Important but not required
- ☐ Not a priority

Should the vendor specialize in specific verticals or industry expertise?

- ☐ Yes (specify: ____________________)
- ☐ No, general sales experience is sufficient

3. Appointment setting and pipeline development

How many qualified meetings per month per SDR do we expect?

- ☐ 5–10
- ☐ 10–15
- ☐ 15+

What percentage of vendor-booked meetings should convert to SQLs?

- ☐ 20–30%
- ☐ 30–50%
- ☐ 50%+

Do we require the vendor to provide pre-call intelligence before meetings?

- ☐ Yes, detailed notes and research
- ☐ Basic prospect details only
- ☐ No, our team will handle research

How should meetings be handed off to internal teams?

- ☐ CRM (Salesforce, HubSpot, etc.)
- ☐ Email/calendar invites
- ☐ Other: ________________

4. Lead nurturing and follow-up

Do we need the vendor to handle long-term lead nurturing for deals with longer sales cycles?

- ☐ Yes
- ☐ No

What level of CRM maintenance and data hygiene should they provide?

- ☐ Basic (update lead status)
- ☐ Advanced (full CRM hygiene and
- ☐ enrichment)

How should lead feedback be captured and reported?

- ☐ Weekly reports
- ☐ Monthly deep-dive reviews
- ☐ Real-time dashboard access

5. Collaboration and integration

How often should the vendor meet with our team for strategy syncs?

- ☐ Weekly
- ☐ Bi-weekly
- ☐ Monthly

What technology integrations are required?

- ☐ Salesforce (SFDC)
- ☐ Outreach, Groove, or Salesloft
- ☐ Other CRM/Sales engagement tools: ________________

Do we have compliance requirements for integrating with our systems?

- ☐ Yes (e.g., GDPR, CCPA, industry-specific regulations)
- ☐ No

6. Marketing services

Do we need the vendor to provide marketing services alongside SDR outreach?

- ☐ Yes
- ☐ No
- ☐ If yes, what types of marketing support do we need? (Check all that apply)
- ☐ Content creation (email templates, messaging frameworks)
- ☐ Digital advertising (LinkedIn, Google Ads, ABM campaigns)
- ☐ SEO or demand generation
- ☐ Other: ________________

7. Recruiting and hiring support

Should we have the option to hire top-performing SDRs into our internal team?

- ☐ Yes
- ☐ No

Do we require SDRs to be able to work on-site at our offices or attend in-person events?

- ☐ Yes
- ☐ No

8. Onboarding, training and enablement

How quickly do we need the vendor to ramp up and onboard SDRs?

- [ ] Within 2 weeks
- [ ] 30 days
- [ ] 60+ days

Should the vendor provide customized sales playbooks?

- [ ] Yes
- [ ] No

How involved do we want to be in training SDRs?

- [ ] Minimal—the vendor should handle all training
- [ ] Joint training with our internal team
- [ ] Vendor provides training materials, but we lead onboarding

9. Global expansion and compliance

Do we need SDRs who can operate in multiple regions?

- [ ] Yes
- [ ] No

Do we require multilingual SDR support?

- [ ] Yes (specify languages: ____________________)
- [ ] No, general sales experience is sufficient

Are there regulatory considerations (GDPR, CCPA, industry-specific laws) the vendor must comply with?

- [ ] Yes
- [ ] No

10. Performance metrics and reporting

What KPIs matter most to us? (Check all that apply)

- ☐ Leads generated per month
- ☐ Meetings booked per SDR per month
- ☐ SQL conversion rates
- ☐ Pipeline contribution
- ☐ Response time to inbound leads
- ☐ Customer satisfaction (NPS, feedback surveys)

What level of reporting visibility do we expect?

- ☐ Weekly reports
- ☐ Bi-weekly reports
- ☐ Monthly reports
- ☐ Real-time dashboard access

11. Cost structure and ROI

Do we need a cost comparison between outsourcing and hiring in-house?

- ☐ Yes
- ☐ No

What pricing model best aligns with our business?

- ☐ Retainer-based
- ☐ Per-meeting pricing
- ☐ Performance-based (commission or revenue-share)
- ☐ Hybrid model

How will we measure the ROI of outsourcing?

- ☐ Cost per lead
- ☐ Pipeline influenced
- ☐ Revenue impact of outsourced SDRs

Final steps before issuing the RFP

- [ ] Review responses with internal stakeholders
- [ ] Prioritize "must-have" vs. "nice-to-have" requirements
- [ ] Align expectations on success metrics and ROI
- [ ] Finalize RFP criteria

This checklist ensures your team has internal alignment before engaging with vendors, making the RFP process **more targeted, efficient and results-driven**.

Next, you will find a general RFP, which you can customize based on the internal checklist you just completed.

Send that in either a word or PDF document, or even an excel spreadsheet to the vendors you are evaluating.

Request for Proposal (RFP):
Outsourced sales development and lead generation services
Issued by: [your company name]
Date issued: [date]
Response due date: [deadline]

1. Scope of Work

The selected vendor will be responsible for the following sales development and lead generation services:

1.1 Lead Generation and Qualification

- Describe your approach to identifying and qualifying prospective customers within target industries and accounts.
- Explain how you execute multi-touch outbound campaigns across phone, email, LinkedIn, and other digital channels.
- Share your methodology for utilizing account-based marketing (ABM) and persona-based selling strategies.
- Detail your experience in vertical-specific outreach strategies and provide relevant case studies.

1.2 Appointment Setting and Pipeline Development

- Explain your approach to scheduling qualified meetings with decision-makers that align with our ideal customer profile (ICP).
- Describe the level of pre-call intelligence and meeting briefs provided before scheduled appointments.
- Outline your expected conversion rate from lead to scheduled meeting and how you ensure high- quality meetings.
- Share how you personalize outreach based on prospect industry, role, and business needs.

1.3 Lead Nurturing and Follow-Up

- Describe your lead nurturing process for long-term opportunities with longer sales cycles.
- Outline how you maintain CRM data, track lead statuses, and provide real-time updates.
- Explain how you gather and analyze prospect feedback and buying signals to refine outreach strategies.

1.4 Collaboration and Integration

- Describe how your team collaborates with internal sales and marketing teams to refine messaging and improve engagement.
- Share how frequently you participate in strategy sync meetings and what topics are covered.
- Explain your ability to integrate with customer CRMs such as Salesforce (SFDC), Outreach, Groove, and other sales engagement platforms.
- Outline your approach to data security and compliance when integrating with customer tools.

1.5 Marketing as a Service

- Explain whether you provide marketing services to enhance outbound sales efforts.
- Detail the types of marketing support available, such as content creation, digital advertising, and ABM campaigns.
- Share how you align marketing services with SDR outreach to improve conversion rates.

1.6 Recruiting and Hiring Support

- Describe whether customers can hire high-performing SDRs into their internal team.
- Outline any contractual limitations on hiring SDRs directly from your organization.

1.7 Onboarding, Training and Enablement

- Describe your structured onboarding and training program for SDRs.
- Share how frequently SDR training is updated to reflect best practices and market changes.
- Outline the customer's role in SDR onboarding and ongoing training.
- Explain whether you provide certifications or skill validation for SDRs.
- Do you provide fully customized sales playbooks tailored to our ICP, industry, and sales motion?

1.8 Team Composition

- Can your SDRs work on-site at customer locations if needed? If so, under what conditions?
- Do your SDRs provide in-person event support at trade shows or conferences (e.g., booth engagement, scheduling follow-up meetings, real-time lead capture)?
- Provide details of your team structure, including SDRs, managers, and support roles.
- Share descriptions of key team members assigned to the project.
- Explain your approach to maintaining a talent pipeline for future in-house hiring needs.

2. Vendor Qualifications

2.1 Required Experience and Expertise

- Describe your experience working with B2B technology, SaaS, or professional services firms.
- Provide case studies and references demonstrating success in pipeline generation.
- Outline your expertise in specific verticals, such as cybersecurity, high-tech, fintech, health tech, data, and AI.
- Share how you leverage data-driven strategies and predictive analytics to refine outreach.
- Explain your structured approach to sales development, including KPIs and optimization frameworks.

2.2 Approach to Performance Management

- Describe your SDR-to-manager ratio and how it impacts performance.
- Explain how you ensure SDRs receive ongoing coaching and skill development.
- Outline the feedback mechanisms you use to assess SDR effectiveness and make real-time improvements.

3. Approach and Differentiators

Vendors should describe how they leverage:

- **Technology and personalization:** Explain how you balance automation with personalized outreach to drive engagement.
- **Predictive analytics and data-driven decision-making:** Outline the tools or methodologies you use to optimize outreach effectiveness.
- **Proven sales frameworks:** Share the methodologies that ensure consistent and scalable success.
- **End-to-end sales support:** Describe whether you provide guidance beyond lead generation, such as sales coaching, pipeline acceleration, or deal support.

- **Flexibility and scalability:** Explain how you tailor engagements to client needs and scale as business requirements change.
- **Competitive pricing models:** Detail pricing options that accommodate different budgets and business models.

4. Global Reach and Compliance

- Describe your global presence and ability to support outreach in multiple regions.
- Share your expertise in compliance and hiring laws in different countries.
- Explain whether you support multilingual SDR outreach and list the available languages.
- Outline your approach to ensuring culturally relevant messaging in different regions.

5. Performance Metrics and KPIs

5.1 Reporting and Analytics

- Explain your approach to integrated reporting across all outreach activities.
- Describe the level of data transparency you offer, including lead scoring, activity tracking, and conversion metrics.
- Outline the frequency and content of your performance reports, including key KPIs.
- Share how you align reporting with sales and marketing teams to optimize strategy.
- Detail your feedback mechanisms, including customer-driven improvements such as NPS and real-time feedback loops.

5.2 Vendors will be evaluated based on their ability to meet the following key performance metrics:

- **Outbound and inbound lead generation**—Specify average lead volume generated per month.
- **Lead quality and scoring**—Explain your lead qualification methodology.
- **Meetings booked**—Minimum expected meetings per SDR per month.
- **Conversion rate**—Minimum expected percentage of meetings resulting in sales-qualified leads (SQLs).
- **Pipeline influence**—Expected pipeline contribution per quarter.
- **Response time**—Time to follow up on inbound leads (e.g., within X hours).
- **Client satisfaction**—Minimum satisfaction score based on feedback surveys.

6. Cost Structure and ROI Analysis

6.1 Pricing and Cost Breakdown

- Provide a detailed breakdown of your pricing model, including retainer-based, per-meeting, performance-based, or hybrid options.
- Outline any additional costs, such as technology fees, reporting costs, or optional add-ons.

6.2 Vendor Cost vs. In-House Sales Team

- Can you provide a direct cost comparison between outsourcing and an in-house SDR team?

6.3 ROI and Business Impact

- Explain how you demonstrate ROI for your clients.
- Provide case studies showcasing cost per lead, pipeline influence, and impact on sales acceleration.
- Share any performance guarantees or SLAs tied to pipeline impact.

7. Proposal Requirements

Vendors must submit proposals including the following:

- **Company overview**—Background, years in business, and industry expertise.
- **Case studies and references**—Examples of similar engagements with measurable outcomes.
- **Approach and methodology**—Description of strategies, playbooks, and process frameworks.
- **Tools and technology stack**—Overview of sales enablement platforms used.
- **Pricing structure**—Transparent breakdown of costs, including retainer fees and performance-based pricing.
- **Implementation timeline**—Estimated ramp-up period and key milestones.
- **Compliance and security**—Adherence to data protection regulations such as GDPR and CCPA.

8. Evaluation Criteria

Proposals will be assessed based on:

- **Alignment with business needs (30%)**—How well the vendor's approach meets our strategic goals.
- **Past performance and references (25%)**—Proven success in similar engagements.
- **Proposal quality (20%)**—Clarity, completeness, and professionalism.
- **Pricing and ROI (15%)**—Competitive pricing and expected return on investment.
- **Technology and reporting capabilities (10%)**—Integration, transparency, and analytics support.

9. Submission Instructions

Proposals must be submitted electronically in PDF format to [contact name] at [email address] by [submission deadline]. For questions regarding this RFP, contact [name] at [phone/email]. late submissions will not be considered.

10. Confidentiality

All information contained in this RFP is confidential and intended solely for the purpose of evaluating vendor capabilities. By submitting a proposal, vendors agree not to disclose any details of this RFP to third parties.

Milestone	Date
Stakeholder feedback around mandatory and nice-to-have criteria	[date]
Vendor evaluation criteria finalized internally	[date]
Finalized list of vendors being evaluated	[date]
RFP issued	[date]
Response deadline	[date]
Proposal submission deadline	[date]
Vendor evaluation and shortlisting	[date]
Final selection and contracting	[date]
Project kickoff	[date]

Next steps

Upon selection, the chosen vendor will undergo an onboarding process, including training sessions, campaign strategy alignment, and system integration.

Contact Us

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