


# Module 4: Introduction to the SDR Role

## CRM Basics for SDRs

By **Lead Generator.store**







Welcome to CRM Basics for SDRs! Today, we're giving you a guided tour of two major tools – HubSpot and Salesforce. Let's dive in and see how CRMs help SDRs stay organized, efficient, and on track!

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**A CRM – or Customer Relationship Management system – is your digital command center. It helps track leads, log interactions, and manage your pipeline, ensuring no prospect slips through the cracks.**





Centralize all lead information,  
Track every email, call, and note,  
And automate reminders and  
follow-ups!

Without a CRM, things can get messy – fast. 📊 But with the right CRM, you can: Centralize all lead information, Track every email, call, and note, And automate reminders and follow-ups!



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HubSpot

<https://www.hubspot.com>

## HubSpot | Software & Tools for your Business - Homepage

What is HubSpot? HubSpot is an AI-powered customer platform with all the software, integrations, and resources you need to connect your marketing, sales, and ...

### Free HubSpot CRM

HubSpot's free CRM powers your customer support, sales, and ...

### Log in to HubSpot

Learn how to log in to HubSpot and how to troubleshoot being ...

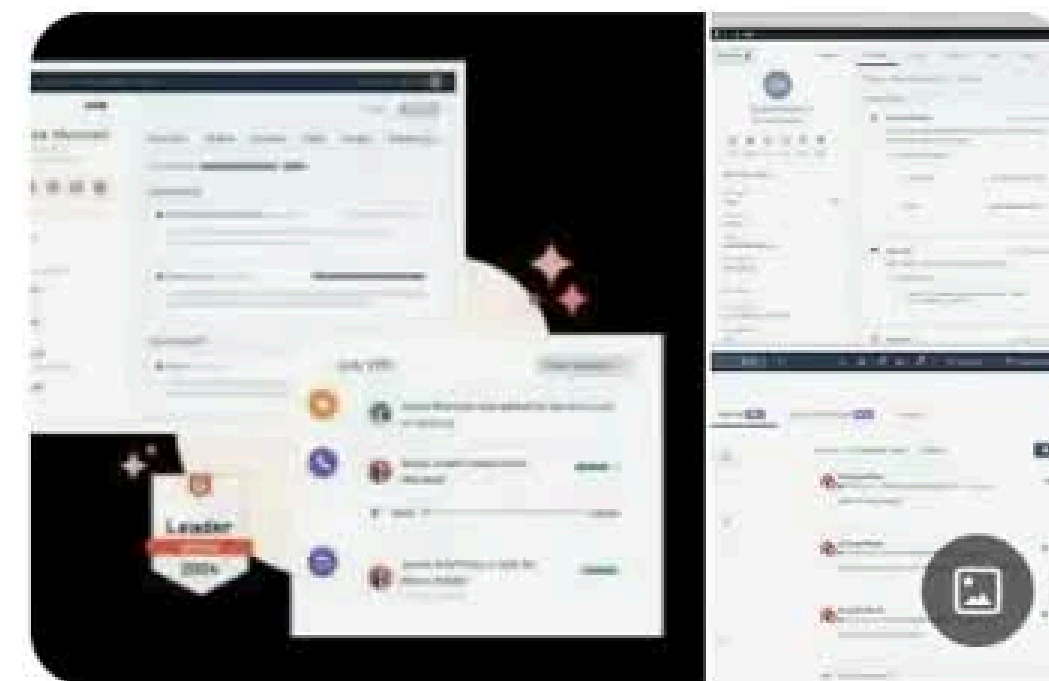
### HubSpot Login and Sign in

Sign into your HubSpot account through HubSpot's login page ...

### Academy

## HubSpot

Software company

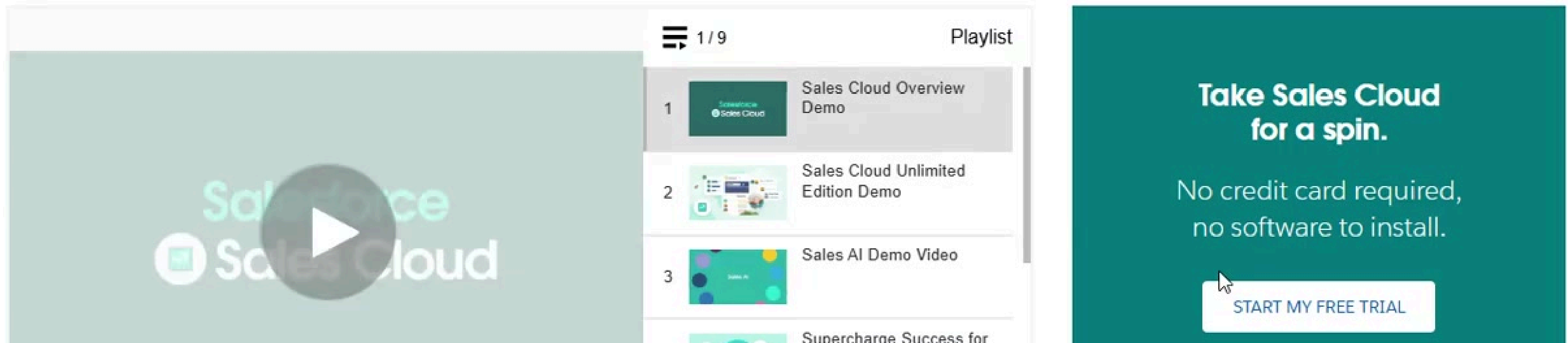


HubSpot, Inc. is an American developer and marketer of

Let's start with HubSpot. Here's your home dashboard – clean and simple. From here, you can see your tasks, deals, and activity feed. When you open a lead, you can see every interaction – emails, calls, and notes. Setting a follow-up task is as easy as a click.



# Watch sales soar with the #1 AI CRM.



The image shows a promotional graphic for Salesforce Sales Cloud. On the left, a video player displays the Salesforce Sales Cloud logo with a large play button. To the right of the video player is a playlist titled "1 / 9" and "Playlist". The playlist contains three items:

- 1 Sales Cloud Overview Demo
- 2 Sales Cloud Unlimited Edition Demo
- 3 Sales AI Demo Video

Below the playlist, a fourth item is partially visible: "Supercharge Success for". To the right of the playlist is a dark teal box with white text that reads:

**Take Sales Cloud for a spin.**

No credit card required,  
no software to install.

A white button with a cursor icon pointing to it says "START MY FREE TRIAL".

Next up – Salesforce. Salesforce is a powerhouse CRM, perfect for managing complex pipelines. Here's your lead pipeline – simple drag-and-drop to move leads forward. Logging communication ensures your whole team stays updated.



## contact record in just a few steps

Contact records store all the information you need for any person who interacts with your business.

Start by **adding some basic details** for one of your contacts. If you don't have a contact to add, we've input your own contact details for you to see how things work.

First name

Ignito

Last name

Boss



ignitoboss@gmail.com



Note



Email



Call



Task



Meeting



More

### About this contact

Email

ignitoboss@gmail.com

Phone Number

Lifecycle Stage

Adding a new lead is a breeze. Just fill in basic details – name, company, email, and any relevant notes. Make sure to assign them to the right stage in the funnel.

Search activities 🔍

Collapse all ▾

Activity

Notes

Emails

Calls

Tasks

Meetings

Filter by: **Filter activity (22/30)** ▾ **All users** ▾

January 2025

**Lifecycle change**

Jan 8, 2025 at 7:11 PM GMT+2

**Ignito Boss** updated the lifecycle stage for this contact to Lead. **View details** ↗

Tracking communication is key. Every email you send, call you make, or meeting you book gets logged – giving you a full history of engagement.







**CRMs let you automate follow-ups – set a reminder, and the system will nudge you when it's time to reach out. Consistency is everything!**

**Now, let's put it all together – add a lead, log a call, and set a follow-up. This simple process keeps your pipeline flowing smoothly.**



Thanks for Watching!  
By **Lead Generator.store**



**1 Badge  
Earned**