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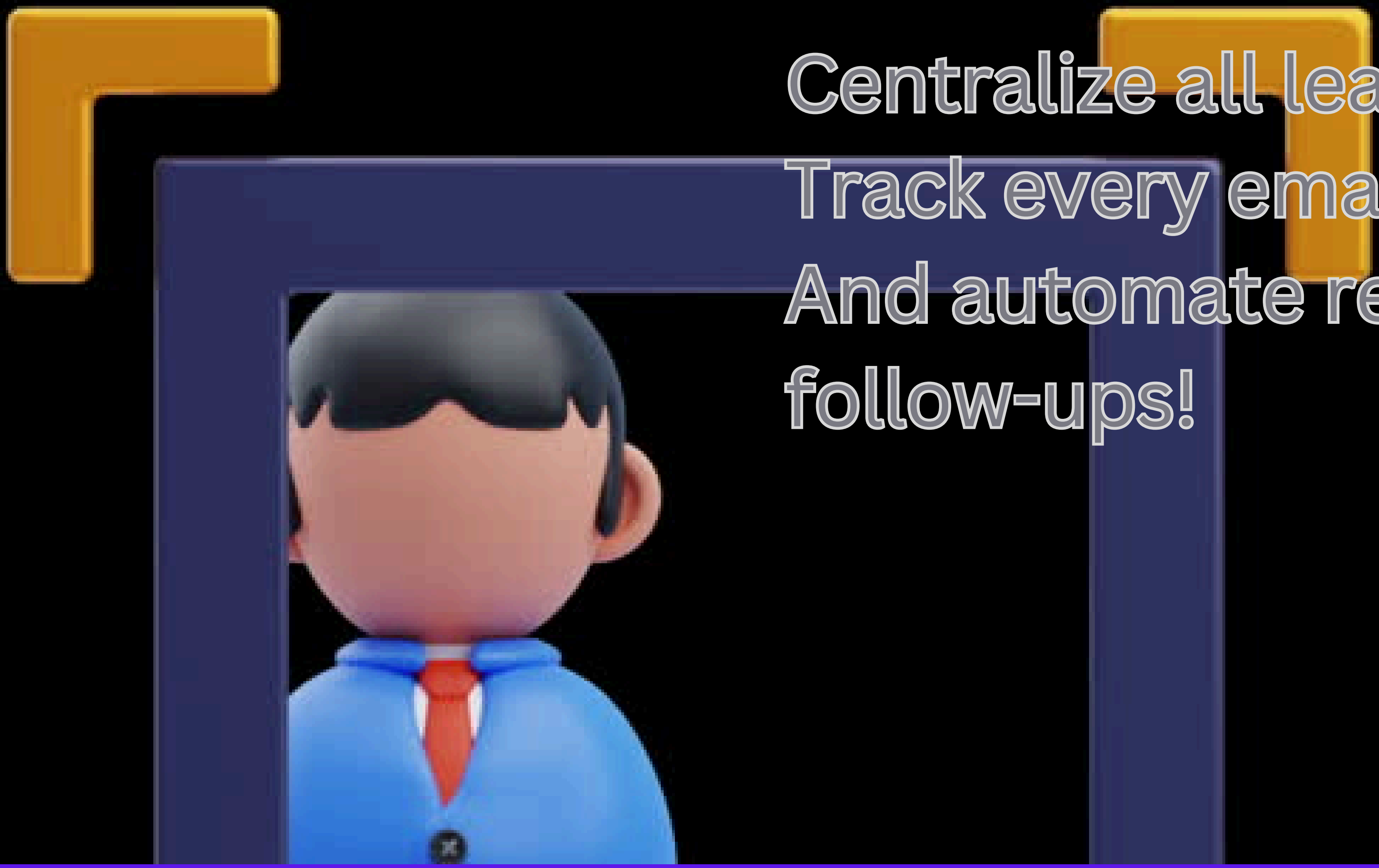
A CRM – or Customer Relationship Management system – is your digital command center. It helps track leads, log interactions, and manage your pipeline, ensuring no prospect slips through the cracks.



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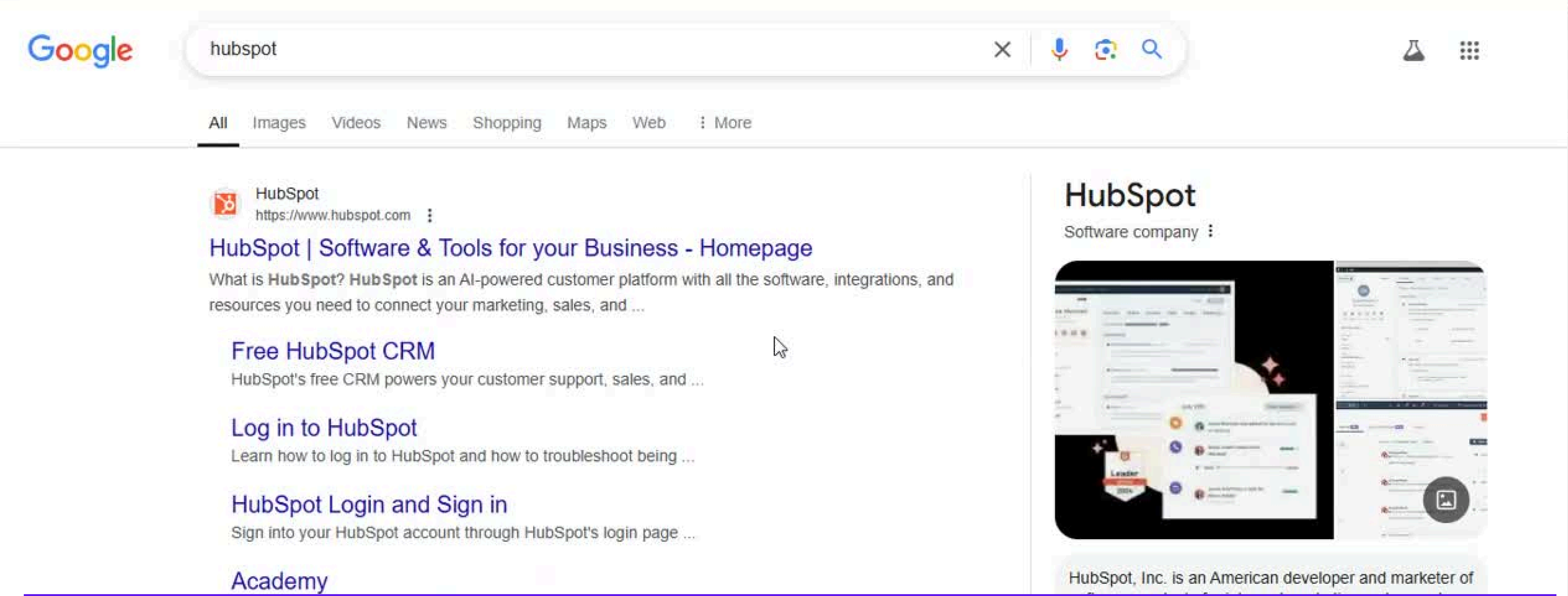
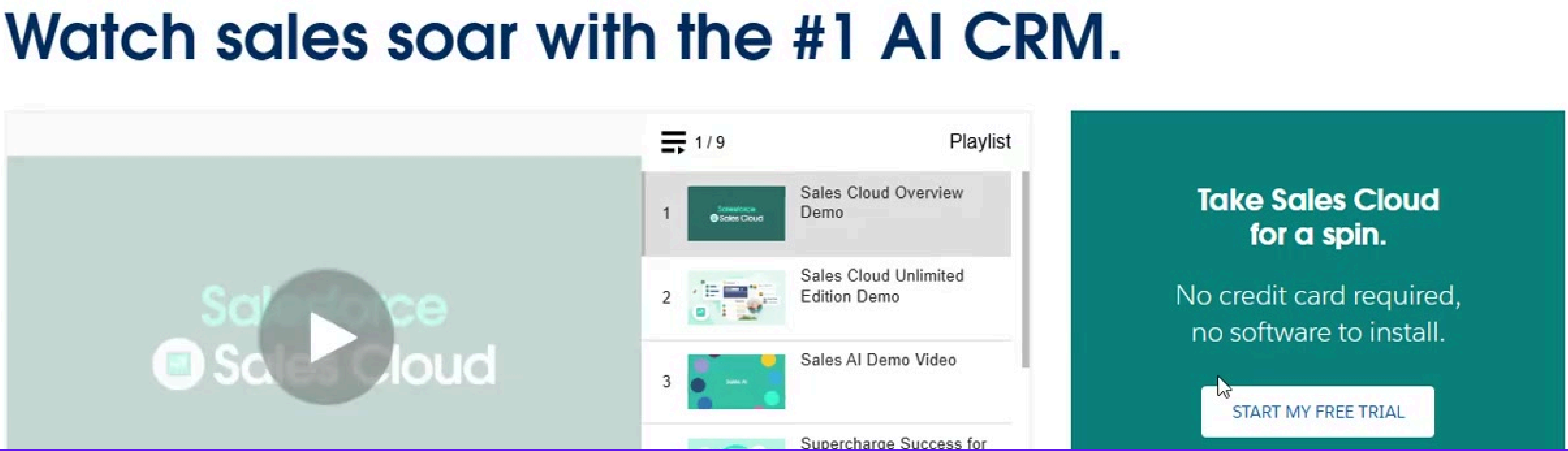
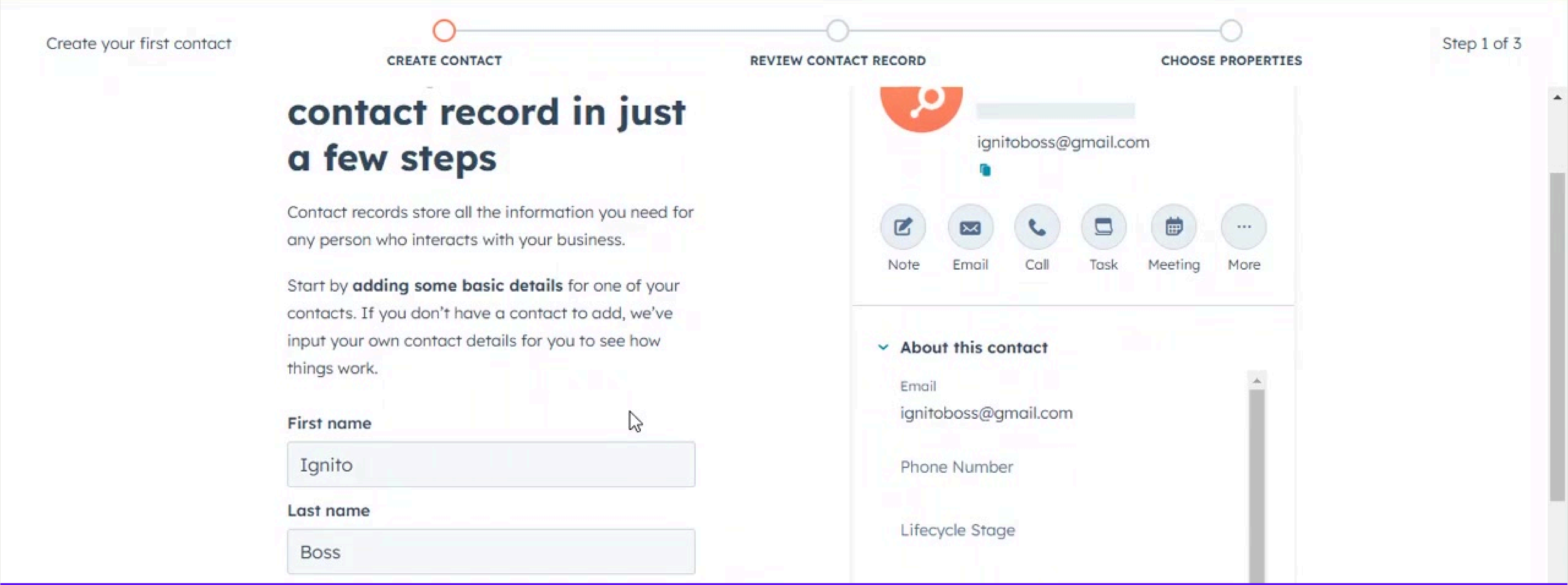
Without a CRM, things can get messy – fast. 📊 But with the right CRM, you can: Centralize all lead information, Track every email, call, and note, And automate reminders and follow-ups!



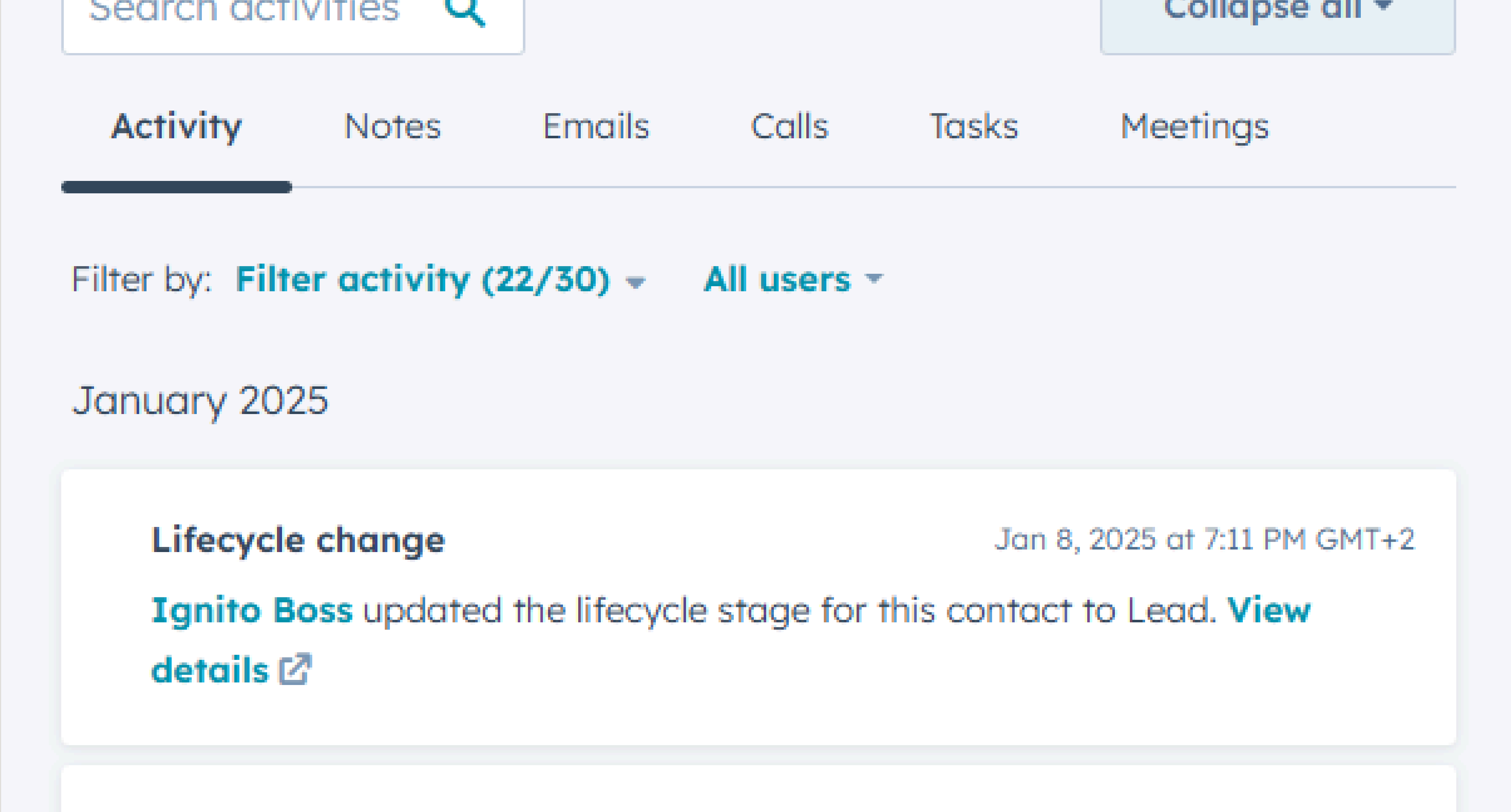
Let’s start with HubSpot. Here’s your home dashboard – clean and simple. From here, you can see your tasks, deals, and activity feed. When you open a lead, you can see every interaction – emails, calls, and notes. Setting a follow-up task is as easy as a click.



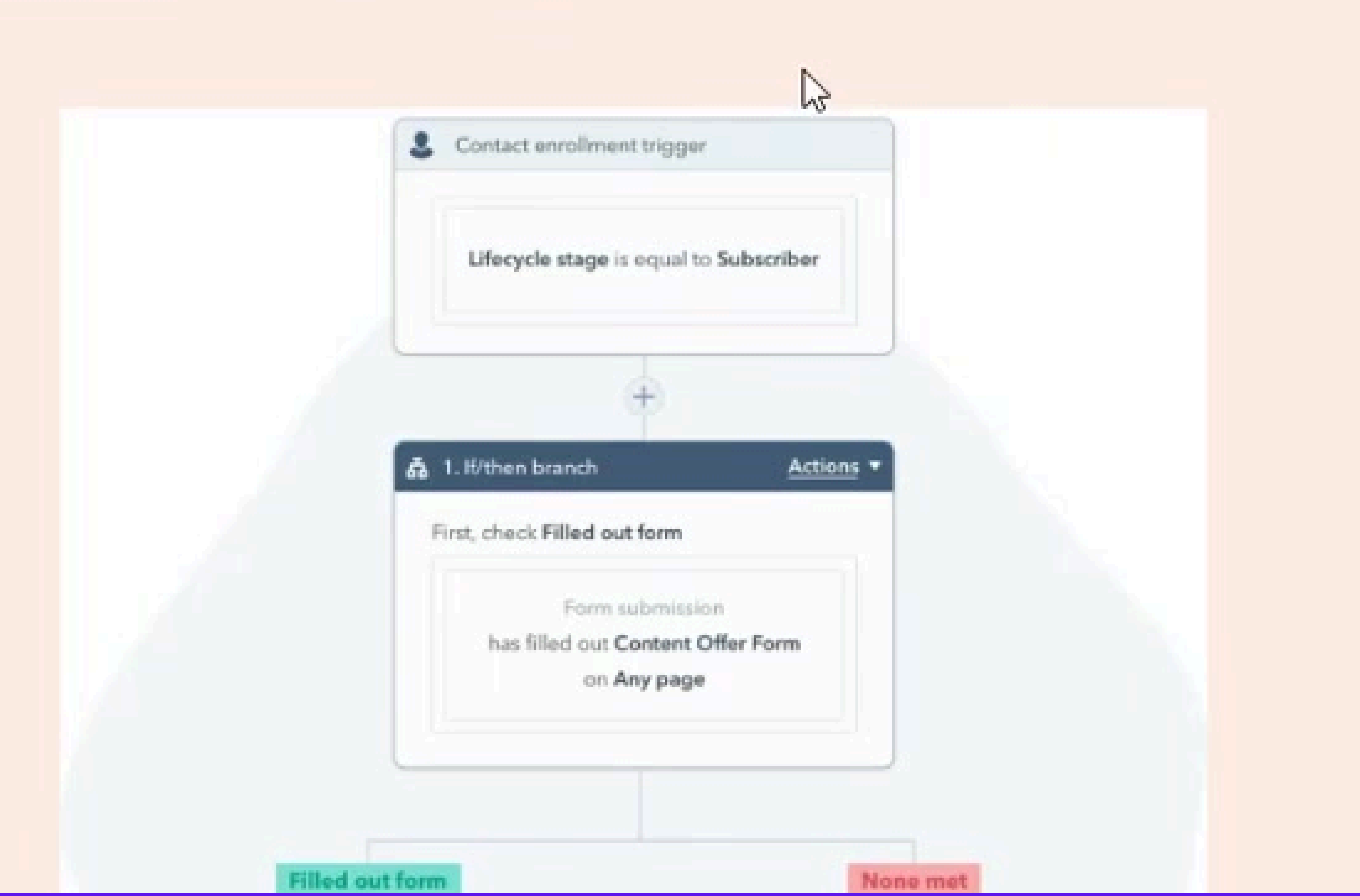
Next up – Salesforce. Salesforce is a powerhouse CRM, perfect for managing complex pipelines. Here’s your lead pipeline – simple drag-and-drop to move leads forward. Logging communication ensures your whole team stays updated.



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.



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!

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