

Your turn! Example deliverables



You are an SDR for a B2B scheduling tool used by clinic operations teams. The tool helps reduce missed appointments and manual follow-up workload. You are reviewing three potential prospects:

- Prospect 1: Multi-site clinic group, growth phase, visible scheduling bottlenecks
- Prospect 2: Small independent clinic, little public information, unclear current process
- Prospect 3: Regional clinic network, recent hiring in operations, no clear urgency signal

Examples of 3-touch Mini Sequences

Prospect	Touch 1	Touch 2	Touch 3
Prospect 1	<i>Confirm current scheduling pain points and who owns them.</i>	<i>Share short benchmark: common no-show and follow-up bottlenecks in multi-site settings.</i>	<i>Invite a 15-minute exploratory call with operations lead.</i>
Prospect 2	<i>Confirm whether scheduling is currently manual or software-supported.</i>	<i>Ask one focused timing question: any current pressure to improve booking flow?</i>	<i>Park politely with a low-pressure recontact window (next quarter).</i>
Prospect 3	<i>Confirm relevance by linking to recent operations hiring signal.</i>	<i>Test urgency: is reduced missed-appointment rate a current initiative?</i>	<i>Suggest short call only if this is on the near-term roadmap.</i>

Examples of Quick Fit / No-Fit Notes

Prospect	Fit signals	No-fit / caution signals	Next-step suggestion
Prospect 1	<i>Multi-site complexity, visible bottlenecks, likely operational impact.</i>	<i>Unknown internal tool stack and buying process.</i>	<i>Contact now with Intent C.</i>
Prospect 2	<i>Could still benefit if current process is manual.</i>	<i>Sparse context, unclear pain severity, unclear budget/timing.</i>	<i>Contact lightly with Intent A, then park if weak response.</i>
Prospect 3	<i>Operations hiring suggests potential process focus.</i>	<i>No visible urgency; initiative may not be active yet.</i>	<i>Contact now with Intent B.</i>

Examples of Short First-touch Messages

Prospect	Intent	Message example
Prospect 1	<i>Intent C - Invite exploratory conversation</i>	<i>"Hi [Name], I noticed your network is scaling across sites and many teams at this stage face rising no-shows plus heavier follow-up workload. We help clinic ops teams reduce both. Open to a short 15-minute exchange to see if this is relevant for your current priorities?"</i>
Prospect 2	<i>Intent A - Confirm relevance</i>	<i>"Hi [Name], quick question: are appointment reminders and follow-ups handled manually today, or through a dedicated workflow? I ask because small clinics often lose admin time here, and we support that exact issue when it is a priority."</i>
Prospect 3	<i>Intent B - Test urgency</i>	<i>"Hi [Name], saw recent operations hiring across your network. Is improving scheduling reliability a current quarter priority, or something planned later? If useful, I can share two practical patterns other clinic groups used to reduce missed appointments."</i>

Examples of 60-second Conversation Openings

Prospect	Opening script
Prospect 1	<p><i>"Thanks for your time. I will keep this brief. I work with clinic operations teams that are scaling across sites and seeing scheduling friction grow. In 60 seconds: I would like to confirm whether missed appointments and follow-up workload are active pain points for your team right now, then decide together if a deeper conversation is useful."</i></p>
Prospect 2	<p><i>"Thanks for taking the call. I only need one minute to validate fit. I support smaller clinics that want to simplify reminders and reduce manual admin steps. I would like to understand your current process first; then we can quickly decide whether this is relevant now or better revisited later."</i></p>
Prospect 3	<p><i>"Appreciate the time. I saw your recent operations hires and wanted to test one hypothesis: when networks scale, scheduling consistency often becomes a top process issue. In this first minute, I would like to confirm whether this is a current priority for your team and agree on the right next step."</i></p>