



5 FREE PROMPTS FROM THE SDR'S AI TOOLKIT

SDR AI Starter Kit

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5 Free Prompts from The SDR's AI Toolkit

This is a sample of The SDR's AI Toolkit — 5 prompts pulled from the full collection of 31. Each one covers a different stage of your prospecting workflow.

Why these aren't generic prompts. Most AI prompts for sales are variations of "write me a cold email." The output sounds like AI wrote it, and you spend more time editing than you saved. Every prompt here is built for a specific SDR task — the context, tone, and format are already baked in. That's why the output reads like a rep who did their homework, not a chatbot blasting templates.

What's inside:

- 1. Prospect Research Summary Generator** — Turn a prospect's LinkedIn and company info into a structured research brief
 - 2. Personalized Cold Email from Prospect Research** — Write a first-touch email grounded in actual research
 - 3. Trigger Event to Outreach Converter** — Turn funding rounds, new hires, and product launches into outreach angles
 - 4. Multi-Step Email Sequence Builder** — Build a complete multi-touch sequence with varied angles
 - 5. SDR-to-AE Handoff Brief** — Turn your scattered notes into a clean handoff doc your AE will actually use
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How to use: Copy the prompt, paste it into ChatGPT, Claude, Gemini, or any AI tool, replace the [BRACKETED_PLACEHOLDERS] with your details, and run it.

Research & ICP

#2 Prospect Research Summary Generator

Research

- You've got a list of Tier 1 accounts to work and need quick-hit research briefs before you start writing outreach. This prompt turns 10 minutes of tab-switching into 2 minutes of structured output.

THE PROMPT

I'm an SDR preparing to prospect into a target account. Generate a research summary

I can use to personalize my outreach across email, phone, and LinkedIn.

Structure the summary as:

1. **Company snapshot** – what they do, size, funding stage, recent momentum
2. **Key prospect info** – the person I'm targeting, their role, tenure, likely priorities
3. **Potential pain points** – 3 business challenges they probably face based on their industry, size, and role (be specific, not generic)
4. **Trigger events** – any recent news, hires, funding, product launches, or market shifts I can reference in outreach
5. **Connection angles** – mutual connections, shared groups, content they've posted or engaged with, conference appearances
6. **Personalization hooks** – 2-3 specific opening lines I could use in a cold email that prove I did my homework

Company name:

[COMPANY_NAME]

Prospect name and title:

[PROSPECT_NAME_AND_TITLE]

What we sell (one sentence):

[YOUR_VALUE_PROP]

Any intel I already have:

[EXISTING_INTEL]

EXAMPLE INPUT

Company: Ramp (corporate card and spend management)
Prospect: Sarah Chen, VP of Engineering
What we sell: Developer productivity platform that reduces CI/CD pipeline time by 60%
Intel I have: They just raised Series D at \$7.65B valuation. Growing engineering team fast -- 15 open engineering roles on their careers page.

EXAMPLE OUTPUT

Prospect Research Brief – Sarah Chen, VP Engineering @ Ramp

Company Snapshot

Ramp is a corporate card and spend management platform valued at \$7.65B (Series D). They serve 25,000+ businesses and have grown from 500 to 900+ employees in the past year. Product velocity is a core differentiator -- they ship features faster than Brex and compete on product, not just pricing. Engineering is their strategic lever.

Key Prospect Info

Sarah Chen – VP of Engineering. Based on typical VP Eng scope at a company this size, she likely owns: engineering team scaling, infrastructure reliability, developer experience, and shipping velocity. With 15 open engineering roles, she's in hyper-growth hiring mode, which means onboarding efficiency and tooling standardization are top of mind.

Potential Pain Points

1. **CI/CD bottlenecks at scale** – Adding 15+ engineers to an already-fast shipping culture creates pipeline congestion. Build times that worked at 50 engineers break at 150.
2. **Developer onboarding friction** – New engineers need to ship code in their first week to justify the hiring investment. Slow tooling extends ramp time.
3. **Infrastructure costs growing with headcount** – More engineers = more compute. If CI/CD isn't efficient, cloud costs scale linearly (or worse) with team size.

Trigger Events

- Series D at \$7.65B valuation (Q1 2026) – capital to invest in infrastructure
- 15 open engineering roles – scaling pain is imminent, not theoretical
- Ramp has publicly emphasized speed as a product differentiator (CEO Eric Glyman has talked about shipping velocity in multiple interviews)

Connection Angles

- Check LinkedIn for mutual connections in fintech engineering leadership
- Sarah may have spoken at fintech or engineering leadership events (check past speaker lists for QCon, LeadDev, or internal Ramp engineering blog posts)
- Ramp's engineering blog may give insight into their tech stack and current challenges

Personalization Hooks

1. "Ramp ships faster than almost anyone in fintech – but with 15 new engineers ramping, keeping that velocity is a different problem than building it."
2. "Saw Ramp just closed the Series D. When engineering teams scale this fast, CI/CD pipelines usually become the bottleneck before hiring does."
3. "If your build times are still under 10 minutes with the team growing this quickly, I'm genuinely impressed. If not – that's exactly what we fix."

★ SDRs spend roughly 37% of their day on research and data tasks. Use this prompt to batch-process your top 5-10 accounts at the start of each week. Paste the output directly into your CRM account notes so you're not re-researching every time you need to write an email or prep for a call.

- You spotted a trigger event -- a funding round, a new hire, a product launch, an earnings miss -- and you need to turn it into a relevant, non-obvious outreach message within the hour. The window on triggers is short; speed matters.

THE PROMPT

I'm an SDR who just identified a trigger event at a target account. Help me convert this event into personalized outreach that connects the trigger to a real business pain my product solves.

For this trigger, generate:

- Why this trigger matters** – what business problem or priority does this event create or amplify? Be specific about what changes inside the company.
- Cold email** – a 4-6 sentence email that references the trigger naturally (not "Congrats on your funding!"), connects it to a pain point, and asks for 15 minutes. Keep it under 100 words.
- LinkedIn connection request note** – under 300 characters. Reference the trigger without being sycophantic.
- Cold call opener** – a 15-second opening that uses the trigger as a pattern interrupt. Conversational, not scripted.
- Voicemail script** – 25 seconds max. Reference trigger, state value, leave callback CTA.

Trigger event:

[TRIGGER_EVENT_DETAILS]

Prospect:

[PROSPECT_NAME_AND_TITLE]

Company:

[COMPANY_NAME]

What we sell:

[YOUR_PRODUCT_AND_VALUE_PROP]

EXAMPLE INPUT

Trigger: Datadog just posted 12 open SRE/DevOps roles in the past two weeks, all focused on "scaling observability infrastructure"

Prospect: Maria Torres, VP of Infrastructure Engineering

Company: Datadog

What we sell: Infrastructure cost optimization platform that reduces cloud spend

by 30-40% without performance impact

EXAMPLE OUTPUT

Why This Trigger Matters

12 SRE/DevOps hires focused on "scaling observability infrastructure" signals that Datadog's own internal infrastructure costs are growing faster than they'd like. When a company that sells observability needs to scale its own observability infra, it usually means cloud costs are outpacing revenue growth. Hiring to throw bodies at the problem instead of optimizing spend is a common – and expensive – pattern. Maria, as VP of Infrastructure Engineering, is likely the one feeling pressure to keep infrastructure costs in check while supporting rapid product growth.

Cold Email

Subject: 12 SRE hires to scale infra?

Maria – saw Datadog just posted a dozen SRE roles focused on scaling observability infrastructure. That's a big investment in bodies to solve what might partly be a cost efficiency problem.

We help infrastructure teams at companies like [SIMILAR_CUSTOMER] reduce cloud spend by 30-40% without impacting performance – which often means they can scale with 4 engineers instead of 12.

Worth 15 minutes to see if that math applies to your team?

LinkedIn Connection Request

Noticed Datadog's hiring 12 SREs to scale infra. We help teams solve the same problem with fewer hires and lower cloud spend. Would love to connect.

Cold Call Opener

"Maria, this is [YOUR_NAME] from [YOUR_COMPANY]. I noticed Datadog's on a hiring tear – 12 SRE roles to scale your observability infra. That's a massive investment. I'm reaching out because we've helped similar teams cut that need in half by optimizing cloud spend before adding headcount. Is that a conversation worth having?"

Voicemail Script

"Maria, [YOUR_NAME] from [YOUR_COMPANY]. Quick one – noticed Datadog posted 12 SRE roles to scale infrastructure. We help teams like yours reduce cloud costs by 30-40%, which usually means you can scale with fewer hires. Might save your team a few million this year. My number is [YOUR_PHONE]. That's [YOUR_NAME], [YOUR_COMPANY]."

- ★ The best trigger-based outreach never starts with "Congrats on..." because every other SDR leads with that. Instead, connect the trigger to a business implication the prospect hasn't heard from anyone else. SDRs who reference trigger events in outreach see meaningfully higher response rates, but only when the connection to a pain point is genuine -- not forced. --- ## Category: Cold Email

Cold Email

#6 Personalized Cold Email from Prospect Research

Cold Email

- You've done your research and need to write the actual email. This is the highest-stakes piece of SDR writing -- 50-125 words that need to earn a reply from someone who gets 50 cold emails a week and deletes 49 of them.

THE PROMPT

I'm an SDR writing a personalized cold email first touch. Write me an email that will stand out in a crowded inbox and earn a reply.

Rules:

- Under 100 words (shorter = higher reply rates)
- No "I hope this finds you well" or any filler greeting
- Open with something specific to THIS prospect (not a generic compliment)
- Connect their situation to a pain point my product solves
- Include one proof point (customer result, stat, or specific claim)
- End with a low-friction CTA (not "Let me know if you'd like a demo")
- Write it like a human SDR, not a marketing team. Casual but professional.

Prospect:

[PROSPECT_NAME_AND_TITLE]

Company:

[COMPANY_NAME]

What I know about them (research notes):

[RESEARCH_NOTES]

What we sell:

[YOUR_PRODUCT_AND_VALUE_PROP]

Relevant proof point:

[CUSTOMER_RESULT_OR_STAT]

EXAMPLE INPUT

Prospect: James Park, Director of Revenue Operations

Company: Lattice (performance management platform)

Research: Lattice is expanding into HRIS and compensation management. They recently acquired a small comp benchmarking startup. RevOps team has grown from 3 to 8 people

in 6 months based on LinkedIn. James was previously at Segment.
What we sell: Revenue intelligence platform that unifies CRM, engagement, and billing data to show pipeline health in real-time
Proof point: Helped a similar-stage HR tech company reduce forecast error by 35% within one quarter

EXAMPLE OUTPUT

Subject: RevOps growing fast at Lattice

James – scaling a RevOps team from 3 to 8 while Lattice launches HRIS and comp products sounds like a data unification headache.

When you were at Segment, you had clean data piped everywhere. At Lattice right now, I'd guess CRM, engagement, and billing data live in three different places and your forecast depends on stitching them together manually.

We helped an HR tech company at a similar stage cut forecast error by 35% in one quarter by unifying those sources automatically.

Worth a 15-minute look?

- ★ Cold email reply rates hover around 1-2% on average, but emails with genuine personalization (referencing something specific about the prospect, not just their company) can push reply rates to 5-8%. The test: would this email make sense if sent to anyone else? If yes, it's not personalized enough. Also -- keep subject lines under 7 words and lowercase. They feel like a message from a colleague, not a sales pitch.

- You've written the email body but need subject lines that actually get opened. Or your current sequence has mediocre open rates and you need fresh variants to A/B test.

THE PROMPT

I'm an SDR who needs compelling subject lines for cold emails. Generate 10 subject line options and organize them by style so I can A/B test different approaches.

Rules:

- 4-7 words max (shorter = higher open rates)
- Lowercase feels personal (like a colleague's email, not a marketing blast)
- No clickbait or misleading subject lines (CAN-SPAM requires honest subject lines)
- No exclamation marks
- No emojis
- Each should feel like it was written by a human, not a marketing team

Organize into these categories (2-3 per category):

1. **Question-based** – provokes curiosity
2. **Name/company drop** – leverages social proof or familiarity
3. **Pain-point direct** – calls out the problem
4. **Pattern interrupt** – unexpected, makes them pause

Context:

Prospect's role: [PROSPECT_TITLE]

Their company: [COMPANY_NAME]

Pain point: [MAIN_PAIN_POINT]

Our solution (one line): [YOUR_VALUE_PROP]

Social proof (if available): [CUSTOMER_NAME_OR_RESULT]

EXAMPLE INPUT

Prospect's role: Head of Demand Gen

Their company: Notion

Pain point: Attribution across PLG + sales-assisted motions is broken – they can't

tell which campaigns drive pipeline vs. which drive free signups that never convert

Our solution: Multi-touch attribution platform built for PLG companies

Social proof: Used by Figma and Canva's demand gen teams

EXAMPLE OUTPUT

Question-Based

1. "which campaigns actually drive pipeline?"

2. "attribution across PLG + sales – solved?"
3. "do you know what's converting at Notion?"

Name/Company Drop

4. "how Figma's demand gen team fixed this"
5. "Notion + what Canva figured out"

Pain-Point Direct

6. "free signups that never convert"
7. "PLG attribution is lying to you"
8. "the pipeline you can't see"

Pattern Interrupt

9. "quick math on your funnel"
10. "this might be wrong"

A/B Testing Recommendation

Start with #7 vs. #1 as your first test. Pain-point direct lines tend to win on open rates for director-level prospects because they signal "I understand your specific problem." Question-based lines win on reply rates because they create a mental gap the prospect wants to close.

Test with a minimum of 100 sends per variant before drawing conclusions.
Swap the loser after one week.

- ★ Subject lines make or break your open rate, and open rate determines how many people even see your carefully written email. The data shows: lowercase subject lines outperform title case for cold outreach. Personalized subject lines (with the prospect's company name or a specific reference) lift open rates. And "Re:" tricks may boost opens short-term but destroy trust and get you spam-flagged. Play the long game.

The Handoff

#25 SDR-to-AE Handoff Brief

The Handoff

- You've qualified a lead and booked a meeting with your AE. This is the handoff document that determines whether your AE walks into the meeting prepared or starts from scratch. The handoff is where most deals die -- 68% of B2B companies report misalignment between SDRs and AEs during handoff.

THE PROMPT

I'm an SDR creating a handoff brief for my AE. Build a comprehensive document that gives them everything they need to run a great first meeting.

Structure:

1. **Quick summary** – who, what company, why they took the meeting, and the one thing the AE must know (3 sentences max)
2. **Prospect profile** – title, role scope, reporting structure, tenure, background
3. **Company profile** – size, industry, growth stage, recent news, tech stack
4. **Discovery findings** – BANT/MEDDIC summary, qualification details, pain points in their own words
5. **Competitive landscape** – what they use now, what they've evaluated, what they've rejected and why
6. **Relationship notes** – rapport built, communication style, personal details that help the AE connect (mentioned kids, college, hobbies – not in a creepy way)
7. **Meeting prep recommendations** – suggested demo focus, questions to ask, topics to avoid, what will impress vs. what will annoy them
8. **Full email/call thread summary** – key touchpoints and prospect responses

My notes:

[ALL_NOTES_FROM_ENGAGEMENT]

Prospect:

[PROSPECT_NAME_AND_TITLE]

Company:

[COMPANY_NAME]

Meeting date/time:

[MEETING_DETAILS]

EXAMPLE INPUT

Notes: Connected with Derek on LinkedIn after commenting on his post about data team burnout. He accepted my connection request and we went back and forth about the challenge of scaling analytics without burning out the team. I sent a cold email referencing a stat about data teams spending 40% of time on manual data quality. He replied "yeah, that's basically our life right now." We had a 15-minute call. His data team is 8 people covering a 2,000-person company. They're drowning in ad-hoc data requests from every department. They use dbt and Snowflake but everything still requires a data engineer to build and maintain. He's been asking for two more hires but the CFO keeps pushing back. He said "I need a tool that makes my 8 people feel like 12." He's the decision-maker for data tools but needs CFO sign-off for anything over \$50K/year. He hates long demos – said "show me it works in 10 minutes or I'll assume it doesn't." He's based in Austin, mentioned he runs ultramarathons (that came up when discussing endurance and team stamina).

EXAMPLE OUTPUT

SDR-to-AE Handoff Brief

Quick Summary

Derek Park, Head of Data Engineering at TechCorp (2,000 employees). 8-person data team that's underwater with ad-hoc requests and no headcount relief in sight. He took the meeting because he needs to "make 8 people feel like 12" – his exact words.

Prospect Profile

- **Name:** Derek Park
- **Title:** Head of Data Engineering
- **Reports to:** CTO (likely), with CFO holding budget authority
- **Team:** 8 data engineers covering a 2,000-person company
- **Background:** Hands-on technical leader. Values efficiency and directness.
- **Based in:** Austin, TX

Company Profile

- **Company:** TechCorp
- **Size:** ~2,000 employees
- **Tech stack:** Snowflake (data warehouse), dbt (transformation), likely Fivetran or Stitch for ingestion
- **Growth stage:** Mid-market, established enough to have 8 data engineers but

constrained enough that 2 more headcount requests got denied

Discovery Findings (BANT)

- **Budget:** Needs CFO approval for anything over \$50K/year. Budget is constrained – he's been denied headcount, so demonstrating ROI vs. hiring costs is the key angle.
- **Authority:** Derek decides on data tools. CFO is the economic buyer for larger purchases. CTO likely influences but doesn't block.
- **Need:** Acute. Team of 8 drowning in ad-hoc requests across every department. Current setup (dbt + Snowflake) works but everything requires a data engineer to build and maintain. He described the situation as "basically our life right now" when referencing the 40% time-on-data-quality stat.
- **Timeline:** No hard deadline mentioned, but urgency is real – he's living the pain daily. Position this as a Q2 decision to get budget in current cycle.

Competitive Landscape

- **Current state:** dbt + Snowflake, manual processes, data engineers as bottleneck
- **No formal evaluation underway** – he's problem-aware but not solution-shopping yet. This is an opportunity to frame the category.
- **Risk:** "Build vs. buy" – his team might try to build something internally

Relationship Notes

- Connected via LinkedIn social selling (I commented on his posts about data team burnout before reaching out)
- He's direct and impatient – respects people who don't waste his time
- Runs ultramarathons – values endurance and grit. Light reference to this would build rapport (don't force it)
- He's an advocate for his team – frame everything as "how this helps your team" not "how this helps the company"

Meeting Prep Recommendations

- **Demo approach:** He said "show me it works in 10 minutes or I'll assume it doesn't." Lead with a live demo, not slides. Show the most impressive thing first.
- **Key question to ask:** "If you could eliminate one type of ad-hoc request from your team's plate tomorrow, what would it be?" (This tells you the demo use case.)
- **What will impress him:** Speed. Specificity. Showing you understand dbt/Snowflake workflows.
- **What will annoy him:** A long intro, company history slides, asking questions you should already know (he'll expect the AE to know everything from this brief).
- **Avoid:** Don't pitch this as "AI" or "magic" – he's a data engineer. He wants to see how it works under the hood.

Thread Summary

1. LinkedIn: Commented on his data team burnout post (built familiarity)
2. LinkedIn: Connection request accepted, exchanged messages about scaling analytics
3. Cold email: Referenced 40% stat about data quality time
4. Email reply: "Yeah, that's basically our life right now"
5. Discovery call: 15-minute call, qualified as above
6. Meeting booked: [DATE/TIME] – 30-minute demo with AE

- ★ The SDR-to-AE handoff is where deals live or die. AEs who walk into a first meeting with rich context close at a significantly higher rate than those winging it. The best handoff briefs include the prospect's own words (direct quotes), specific red flags to avoid, and a recommended demo strategy. Your AE should read this and feel like they already know the person. That's the standard.

Want the Full Toolkit?

The full SDR's AI Toolkit covers your entire prospecting workflow — from ICP research to AE handoff.

Standard — \$39

- 31 copy-paste AI prompts (including 3 compliance & quality prompts)
- Real examples with every prompt
- Pro tips grounded in SDR/BDR best practices
- Workflow map, prompt chains, and quick-reference cheat sheet
- Customization guide for adapting prompts to your product and market

Pro — \$69

Everything in Standard, plus 31 advanced prompts (62 total):

- Multi-thread outreach plans for enterprise accounts
- Territory planning and quarterly strategy documents
- Weekly performance summaries and self-coaching frameworks
- Advanced sequence designs (industry-specific, persona-specific, ABM-specific)
- Manager prompts: team performance analysis, coaching prep, new hire ramp plans
- Extended prompt chains covering full research-to-close workflows

Get the toolkit at: aitoolkitshop.com/sdrs-bdrs/

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